Arkansas Single Parent Scholarship Fund

Scholarship Management System

User Manual

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DISCLAIMER

The Scholarship Management System (the System) is proprietary software developed by the Arkansas Single Parent Scholarship Fund (ASPSF). It is intended to be used by staff and members of ASPSF and its affiliates for the purpose of managing all aspects of the scholarship development and award process and reporting required information to ASPSF. It was also developed for use by single parents to apply for affiliated Single Parent Scholarships, monitor application and award status, and self-report follow-up data to SPSF. Use for any other purposes or by any other individuals violates the Terms of Use.

The information in this document is subject to change without notice. No part of this manual may be reproduced or transmitted for any reason other than for its intended purpose to manage scholarship and member information of the affiliate network of the Arkansas Single Parent Scholarship Fund.

TERMS OF USE

Any person who signs into the SMS is treated by ASPSF as having agreed to the Terms of Service. These Terms may be updated from time to time, without notice. Continued use of the SMS by individuals indicates they agree with the updated Terms.

The Scholarship Management System ("SMS") contains personally identifiable information. Authorized users of the System must insure the protection of private and sensitive information stored in the System by adhering to the general provisions outlined in the Family Educational Rights and Protection Act (FERPA). More information about the provisions of FERPA may be found on **http://www.ed.gov**. Any unauthorized use, or loss or theft of information due to negligence, will be at the risk and liability of the user.

Authorized SMS users shall not permit access to students' personal records without written consent by each student, with the following exceptions:

- Authorized SPSF officials who have a legitimate educational interest in obtaining access to the records. Such access will be granted if the official needs to review an educational record to fulfill SPSF responsibilities.
- Authorized SPSF officials who require access in connection with the student's application for financial aid.
- Authorized SPSF officials may release such information in compliance with a judicial order or lawfully issued subpoena. Before any information is released the SPSF official should practice due diligence to notify the student.
- In cases of emergencies, an authorized SPSF official may release information from educational records to appropriate persons if the knowledge of such information is necessary to protect the health or safety of an individual.

SPSF shall practice due diligence to ensure appropriate policies and procedures are in place, to prevent gross negligence or unlawful breach of privacy. SPSF affiliates are encouraged to maintain a permanent record of all parties who have requested access to the student's records. Such records of access should indicate specifically the date of request, the legitimate purpose of the request, and whether or not the request was granted. This record should be available for the student's inspection upon request.

INTRODUCTION

This User Guide is written for ASPSF and all members and staff of Affiliated SPSFs. It assumes users have a basic knowledge of using the World Wide Web, navigating web pages, using online forms, and using common office applications like Microsoft Office and Adobe Reader.

SYSTEM REQUIREMENTS

- A computer with internet connection. A secure network in a private domain is highly recommended.
- Browser software (Internet Explorer, Mozilla Firefox, Safari, Google Chrome)

SECTIONS OF THIS GUIDE

This guide is compiled into four main sections: (a) Introduction, (b) Staff Screens (the parts of the System accessible to ASPSF Staff), (c) Affiliate Screens (the parts of the System accessible to Affiliate SPSF staff, directors, and fiscal sponsors), and (d) Student Screens (the parts of the System only accessible to SPSF applicants). It also contains a glossary of general terminology utilized throughout this manual.

The Student Screens section of this manual is provided to assist ASPSF staff and Affiliate users with offering technical support to scholarship applicants. This section is also provided to enable users to reach a better understanding of the manner in which the System manages and stores scholarship data.

This User Guide will be made available on the ASPSF website at **http://www.aspsf.org/affiliates_sms.html**.

FEEDBACK AND SUPPORT

TECHNICAL SUPPORT

For technical support, contact the ASPSF IT Director at (479)927-1402 or **cwomack@aspsf.org**. To ensure rapid and useful response, provide the following:

- your name
- a clear explanation of the difference between what you expected to happen and what actually happened
- any error messages verbatim

SUGGESTIONS FOR IMPROVEMENT

If you have any suggestions to improve the features of the Scholarship Management System or its related documentation, send requests by email to ASPSF IT Director at **cwomack@aspsf.org** and provide the following:

- the document title
- the page number(s) to which your comments apply
- a concise explanation of your comments

GLOSSARY

Affiliate – a nonprofit entity that is a member organization of the ASPSF network and is responsible for fundraising and awarding scholarships in a service area comprised of one or more counties in Arkansas or Texas.

Affiliate Member – an individual who is an SPSF employee or volunteer and is directly involved in the administration or operation of a SPSF, regardless of the individual's voting rights on SPSF committees.

Bonus – a special type of award paid to a student, in addition to a regular scholarship, typically in recognition of the student's merit or academic achievement. Example: a graduation bonus.

County – for the purpose of ASPSF, a geographical service area in Arkansas or Texas, that is assigned to one and only one SPSF affiliate. In the Scholarship Management System, scholarship and matching grant records are "owned" by counties.

Dashboard – a screen or window within the Scholarship Management System that provides a related set of tools or displays a collection of related data.

Managed Affiliate – a category describing an SPSF affiliate that has elected to input and manage almost all aspects of its scholarship or program activity using the Scholarship Management System.

Non-Managed Affiliate – a category describing an SPSF Affiliate that has elected to withdraw from using the Scholarship Management System, other than to submit periodic aggregate reports and other required information to ASPSF.

Privilege – a type of access granted to a user role that is dependent on the type and scope of the role. An example is a user's ability to access a student's personal information.

Query – A set of criteria selected by a user from the Reports Dashboard of the Scholarship Management System which is used to retrieve data and generate a desired report.

Record – In the context of the Scholarship Management System, a group of fields that contain specific data describing or related to an Affiliate SPSF, a person, grant, or scholarship award.

Regular Scholarship – a base or standard award of a set or variable amount that is paid to all approved SPSF applicants; an award that is not tied to any special programs or based on any special criteria.

Role – a set of tasks a user is allowed to perform within the Scholarship Management System.

Scholarship Award – recognition or approval of a qualified scholarship application. In the context of the Scholarship Management System, an award value is the dollar amount the affiliate agrees to pay to a student during a single scholarship term. Types of awards are Regular Scholarships, Stipends, and Bonuses.

Scholarship Cycle – refers to the period of time between the date when an Affiliate begins accepting applications for a specific scholarship and the date on which the scholarship recipient provides a final report to the Affiliate, such as final grades (e.g. Spring 2011 scholarship cycle).

Scholarship Disbursement – a payment made to a student representing a portion or lump sum of an approved scholarship award.

Stipend – a special type of award or allowance granted to a student, above and beyond a regular scholarship, typically restricted for a special purpose. Example: gas, clothing, or supplies.

User – a person who is authorized to access the Scholarship Management System and has been assigned roles and privileges within the System.

OVERVIEW OF THE SYSTEM

The Scholarship Management System is proprietary web-based software designed to support the unique and diverse operating needs of Arkansas Single Parent Scholarship Fund and its affiliates.

> A test version of this System for training purposes is available at http://demo.aspsf.org.

ASPSF Staff and Affiliate users can log into the System by opening any browser on any computer capable of connecting to the World Wide Web and navigating to http://manage.aspsf.org.

Affiliates may choose to manage their scholarship program using the Scholarship Management System (known as ***Managed Affiliates***). These affiliates may offer prospective applicants an online scholarship application. A link to the online application is placed on the affiliate's web page hosted through the ASPSF website at http://www.aspsf.org. Data from applications submitted through this method automatically uploads into the System. Affiliate members may proactively review and collaborate with other members who are in different locations to make decisions quickly and efficiently. Students may monitor the status of their applications, self-report annual follow-up information, and update personal profile information.

> Effective January 1, 2014, Non-managed affiliates must begin using the Scholarship Management System to electronically report aggregate data and information to ASPSF.

Affiliates choosing not to manage their scholarship programs through the Scholarship Management System are known as ***Non-managed Affiliates***. Effective January 1, 2013, these affiliates will be required to begin using the Scholarship Management System to electronically report aggregate data and information to ASPSF.

Within the Scholarship Management System, affiliates are managed as organizational entities, while counties are tracked as service territories. Each scholarship record in the System is tied to a county. As ownership over specific service territories change, the System is able to flexibly track the transition. Simply put, if affiliates merge or split, if service areas change, if students move from one county to another, the data will be managed accordingly.

USERS AND ROLES

Each user may hold many roles across multiple affiliates and within the ASPSF Home Office at the same time. All users of the Scholarship Management System must have a username and password. Each user is assigned a role in the System which grants a certain level of permission or privilege to view and manage records. Below is a list of these roles (in order of greatest to least privilege). The privileges assigned to each user depend on the type of tasks each user needs to perform in the System. The Scholarship Management System has a unique method of tracking users, their roles, and their privileges over time.

- **Database Administrator** – responsible for the overall monitoring, and security of the Scholarship Management System; can override any privilege for any user role. This person is responsible for assigning and managing Affiliate Administrator roles and ensuring they are adequately trained in the use of the System.

- **Affiliate Administrator** – responsible for the overall monitoring and security of an affiliate's records that are managed in the System. This role is meant to be assigned to one or two members within each Affiliate. Administrators establish or revoke user access to the affiliate's records. They also ensure that all users are adequately trained in the use of the System. Administrators are assigned all access privileges to the records of their respective Affiliates, by default.
- **Affiliate User** – a general role given to an Affiliate member who needs access to an Affiliate's records for data entry and reporting purposes. This role is by far the most common type of user in the SMS.
- **Field Representative** – a role granted to certain ASPSF staff who need access to specific Affiliate records.
- **ASPSF Staff User** – a role granted to ASPSF staff with the privilege to access aggregate data of all affiliates, record matching grant records, and view specific scholarship records, excluding those that are personally identifiable.
- **ASPSF Board Member User** – a role granted to state ASPSF board members to access aggregate data only.
- **Student** – a role that is automatically assigned to anyone who registers through the Student portal. Student users can view and manage their own personal profile, submit online scholarship applications, and view personal scholarship history.

OVERVIEW OF SYSTEM FEATURES

The **Navigation Bar** across the top of each screen contains navigational links for all screens that are accessible to the user. A **Role Selector Box** at the far-right of the Navigation Bar allows users to choose from any of the roles for which they have been assigned. NOTE: Most users will only be assigned one role. The contents of the Navigation Bar and the color theme of the System will change depending on the role selected.

The main **Dashboard** (like a home page) is the first screen a user sees upon logging into the System. Users with multiple roles are redirected to this page any time they select a different role from the Role Selector Box. This helps avoid data entry errors. The contents of this page also changes depending on the selected role. Managed Affiliates can begin the scholarship review process from this screen. The layout of this page may differ, based on the user's role.

The **Grants** dashboard displays a year-to-date list of matching grant transactions relevant to the role selected in the Role Selector Box. ASPSF Staff have access to enter new matching grant transactions. Affiliate users only have access to review existing transactions.

The **Scholarships** dashboard displays a year-to-date list of scholarship activity. ASPSF Staff have access to view general information about the number and value of scholarships disbursed by year, affiliate, and semester. Managed affiliates have access to more detailed information about specific awards granted to specific students. Managed Affiliates may create new or edit scholarships and online application forms from this screen. Non-managed affiliates do not have access to this dashboard.

The **Affiliates** dashboard displays different content depending on the role selected in the Role Selector Box. ASPSF staff users see an initial display of all affiliates established in the System. More specific information about each affiliate can be accessed by clicking a **Detail** link. The initial display for Managed Affiliates is a view of the detail screen. Non-managed affiliates see this detail immediately on their main Dashboard screen.

The **Contacts** dashboard displays a list of members and/or students depending on the role selected in the Role Selector Box. New or existing contacts may be created or edited from this dashboard. Affiliate Administrators may manage security and user accounts through this dashboard.

The **Reports** dashboard is accessible by all ASPSF and Affiliate users. It is used to generate aggregate information or lists of records. The level of access to the detail of each record depends on the role selected in the Role Selector Box.

The **Forms** dashboard is only accessible to Non-Managed Affiliates. It is used to submit required scholarship award reports and annual reports to ASPSF. The information from these reports may be aggregated from the Reports dashboard.

The **Home** dashboard is only accessible to Student users. This displays a welcome message.

The **My Applications** dashboard is only accessible to Student users. It displays a list of all applications the student has started or completed, along with the scholarship terms and the application's status.

The **My Profile** dashboard is only accessible to Student users. They may edit their contact and demographic information, and self-report their annual follow-up information from this screen.

The **My Disbursements** dashboard is only accessible to Student users. This displays a list of the scholarship awards paid out to the student. Managed Affiliates record this information from the Contact dashboard.

The **Change Password** link is a command available to only Student users. It allows students to change their passwords. It is only available if the user knows his or her former password. This is to help prevent hacking of a student's account by unauthorized users.

The **Logout** link is a command used to sign the user out of the System.

ASPSF STAFF ROLES

This section pertains to roles of a state ASPSF staff or board member. For roles pertaining to an Affiliate SPSF board or staff member, fiscal sponsor, or volunteer, go to the Affiliate Roles section on page 22. State ASPSF staff or board members who need information about accessing records under the role of a specific Affiliate user should also refer to the Affiliate Roles section.

LOGGING INTO THE SYSTEM

When logged in, the user's name as it appears in the user's contact record is displayed in the upper-right area of the screen.

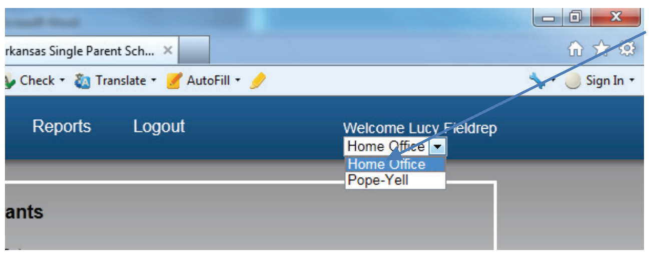

Figure 1 – Role Selector Box

This user can choose between two roles in the Role Selector Box. The screens, data, tools, and privileges for each role are significantly different.

Users are assigned privileges according to their role or task they must perform within the ASPSF network. A user's role and privileges combined determines the level of detail they may access within a certain record. Users who are assigned more than one role within the Scholarship Management System will have the option to choose between these roles using the Role Selector Box in the upper-right area of the screen (Fig. 1). Depending on the role selected, the content and color scheme of each screen may change.

Read about deactivating user accounts and resetting passwords on page 18-19.

MAIN DASHBOARD

The main Dashboard (like a home page) is the first screen a user sees upon logging in. Users who have multiple roles in the System will be directed automatically back to this screen each time s/he chooses a different role from the Role Selector box.

The data displayed on the main Dashboard is relevant to the service area covered by the current role selected. The "Home Office" role displays aggregate, year-to-date statistics for all affiliates across the ASPSF network. To view more detailed statistics or to view statistics for a different range of time, read about generating reports on pages 19-21.

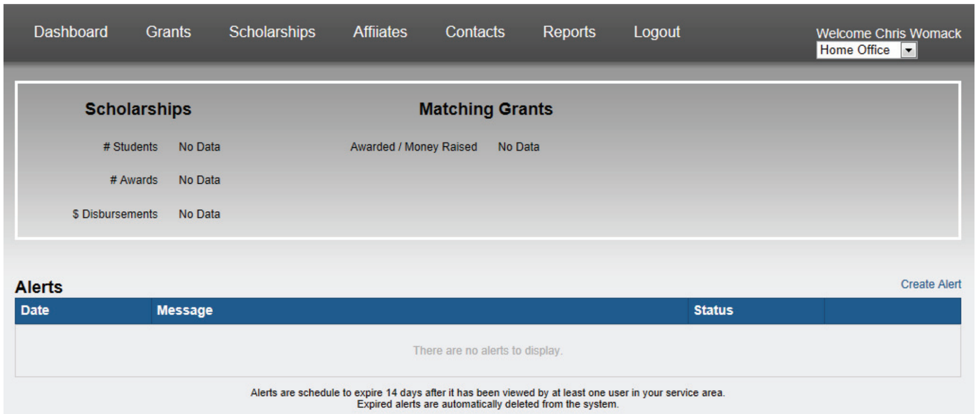

Figure 2 – Home Office users main Dashboard

"$ Disbursements" shows the total actual dollar amount year-to-date paid to students. It does not reflect awards that have been granted but unpaid.

Below are brief descriptions for each statistical indicator displayed on the main Dashboard:

 # Students displays the calendar year-to-date total number of students who have been granted scholarship awards across the ASPSF network.

 # Awards displays the year-to-date total number of scholarship awards across the ASPSF network.

$ Disbursements displays the year-to-date total disbursement value of scholarships granted across the ASPSF network.

Awarded/Money Raised displays the year-to-date total dollars in ASPSF matching grants awarded to all affiliates, compared to the total dollars raised. "Total dollars raised" refers to the amount reported on matching grant requests and does not necessarily reflect total proceeds raised.

ALERTS

The Scholarship Management System offers users a very basic messaging system. Users may post important messages which appear on the Main Dashboard of all users in a selected service area. Alerts are not private messages. Once an alert message has been opened by any one user, the message is set to automatically disappear after 14 days.

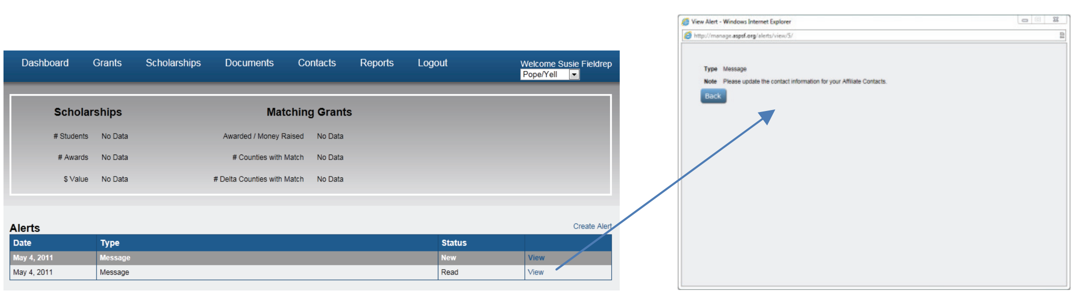

Figure 3 – Viewing an Alert from the main Dashboard

Creating an alert. Click the **Create Alert** link located above the top-right margin of the Alerts table on the Main Dashboard. Select either “Home Office” or an affiliate from the Service Area field.

Viewing an alert. The Alerts table displays all existing Alerts corresponding to the user’s currently selected role. New Alerts appear in bold type with shaded table cells and have a status of “New”. Click the **View** link next to any message to open the message. Once an Alert has been opened by any one user from the same service area, the message status changes to “Read”, and the message is set to automatically disappear after 14 days.

GRANTS DASHBOARD

The Grants dashboard displays all matching grant transactions for all affiliates across the ASPSF network. Transactions are recorded by Home Office users. Below is a brief explanation of each piece of information displayed in the table on this screen:

> **County** is the county to which the grant amount is tied.
>
> **Requested By** is the affiliate or ASPSF representative who prepared or submitted the request for match.
>
> **Type** is the type of grant request. Currently, the only grant type tracked in the System is matching grants.
>
> **Request Date** is the date on which the affiliate representative signed the matching grant request.
>
> **Approval Date** is the date on which ASPSF approved the matching grant request.
>
> **$ Raised** is the total dollar amount raised for the specified county as indicated by the affiliate on the matching grant request form.
>
> **Amount** (or Goal Amount) is the dollar amount of the grant award approved by ASPSF and paid to the affiliate.

Figure 4 – Home Office user’s Grants Dashboard

1 - Sorting columns. Each column of the table may be sorted in ascending or descending order. Click anywhere in the column header or label area to sort a column. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted. Only one column at a time may be sorted. Only one column at a time may be sorted.

2 – Entering matching grant transactions. Click the **+ Create New** button to record a new transaction. All fields except the Approve Date field are required fields.

3 – Searching records. The entire contents of the table (except column headers and other labels) may be searched. Searchable content includes dollar values, dates, text, and any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

- Choose an approval **Status** of the request. Transactions with a status of "Approved" are those that have been reviewed and approved for disbursement. "Pending" status indicates the transaction has been entered but is still under review. "Declined" status indicates the transaction was reviewed and denied.

  The status of Matching grant transactions may be changed after the transaction has been recorded. (see **4 – Editing a matching grant record** below)

- Select the grant type from the **Type** selector box. Currently, the only grant type tracked in the Scholarship Management System is matching grants.
- Enter the **Request Date** in MM/DD/YYYY format (with slashes) or click in field to select the date from a date selector tool. Click the left or right arrows on the calendar to switch months and years.
- Enter the date on which the request was approved by ASPSF in the **Approval Date** field in MM/DD/YYYY format or click in field to select the date from a date selector tool. Click the left or right arrows on the calendar to switch months and years.

  Matching grant transactions with a pending status do not require an approval date. Once the status changes to "approved", the approval date must be recorded. (see **4 – Editing a matching grant record** below).

- Select the **County** for which the matching grant is requested. Request forms that indicate multiple requests (those submitted on behalf of two or more counties) must be recorded as separate transactions. Each transaction should be based on the portion of proceeds earmarked for each respective county.
- From the **Requested By** field, select the name of the affiliate representative who submitted the matching grant request.
- Enter the dollar amount of fundraising proceeds in the **Amount Raised** field as indicated on the Matching Grant Request form.
- Calculate and record the dollar amount of the matching grant award in the **Amount** (or **Goal Amount**) field.
- Click the **Save** button to save any changes to the record or **Cancel** link to return to the Grants dashboard without saving changes.

4 – Editing a matching grant record. Each matching grant record displayed in the table on the Grants dashboard can be edited by clicking the **Edit** link to the right of the record. This opens the record in the

matching grant entry form described above. Once all revisions have been made, click the **Save** button to save any changes. Click the **Cancel** link or navigate away from the window without clicking the **Save** button to discard any changes.

Affiliates may view matching grant transactions recorded for their own service area, but they are not able to record their own requests or edit existing transactions. Transactions appear with an approval date if they have been approved or denied. “Pending” appears in the Approval Date column if the transaction is recorded as pending.

SCHOLARSHIPS DASHBOARD

The Scholarships Dashboard shows scholarship activity for all Managed Affiliates across the ASPSF network. Scholarship records and data appearing on this dashboard reflect data that is collected from only the scholarship applications that are submitted through the Scholarship Management System. Paper-based applications accepted by affiliates cannot be captured on this dashboard, nor can the scholarship activity of Non-managed Affiliates.

Affiliate	County	Year	Term	# Awarded	$ Disbursed	
Jefferson	Jefferson	2011	Fall	556	$278,000.00	Detail
Newton	Newton	2011	Spring	1154	$435,500.00	Detail
Pope/Yell	Pope	2012	Spring	546	$54,600.00	Detail
Pope/Yell	Yell	2012	Spring	546	$54,600.00	Detail
Newton	Newton	2011	Fall	1088	$407,250.00	Detail
Jefferson	Jefferson	2011	Spring	538	$269,000.00	Detail
Newton	Newton	2011	Summer	541	$94,675.00	Detail
Pope/Yell	Pope	2011	Spring	556	$111,200.00	Detail
Pope/Yell	Yell	2011	Spring	556	$111,200.00	Detail

Click the Detail link next to any scholarship record. A new table will appear displaying a specific breakdown.

Figure 5 – Home Office user’s Scholarship Dashboard

Users who have affiliate privileges have access to view more detailed information about each scholarship record by clicking the **Detail** link next to a record in the second detail table.

AFFILIATES DASHBOARD

The Affiliate Dashboard is only accessible to Home Office users and displays a current list of ASPSF affiliates.

Clicking the **Details** link next to an Affiliate record opens the Affiliate’s profile. The profile window displays all of the Affiliate’s activity and program information.

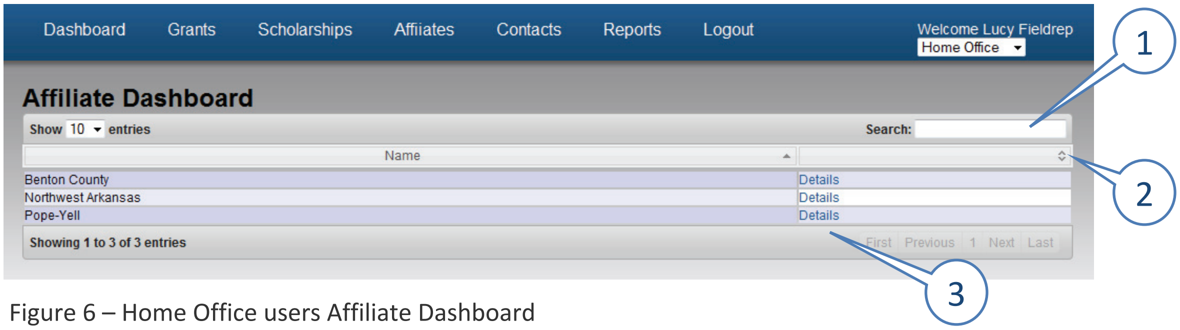

Figure 6 – Home Office users Affiliate Dashboard

1 - Using the Search field. Searchable content includes affiliate names, as well as any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

2 - Sorting table columns. All columns of the Affiliates table may be sorted in ascending or descending order. Only one column may be sorted at a time. Click anywhere in the column header to sort that column. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

3 – Viewing more affiliate detail. Click the **Detail** link next to any Affiliate record to open the Affiliate Profile screen.

AFFILIATE PROFILE DASHBOARD

The Affiliate Profile displays detailed information about the chosen Affiliate.

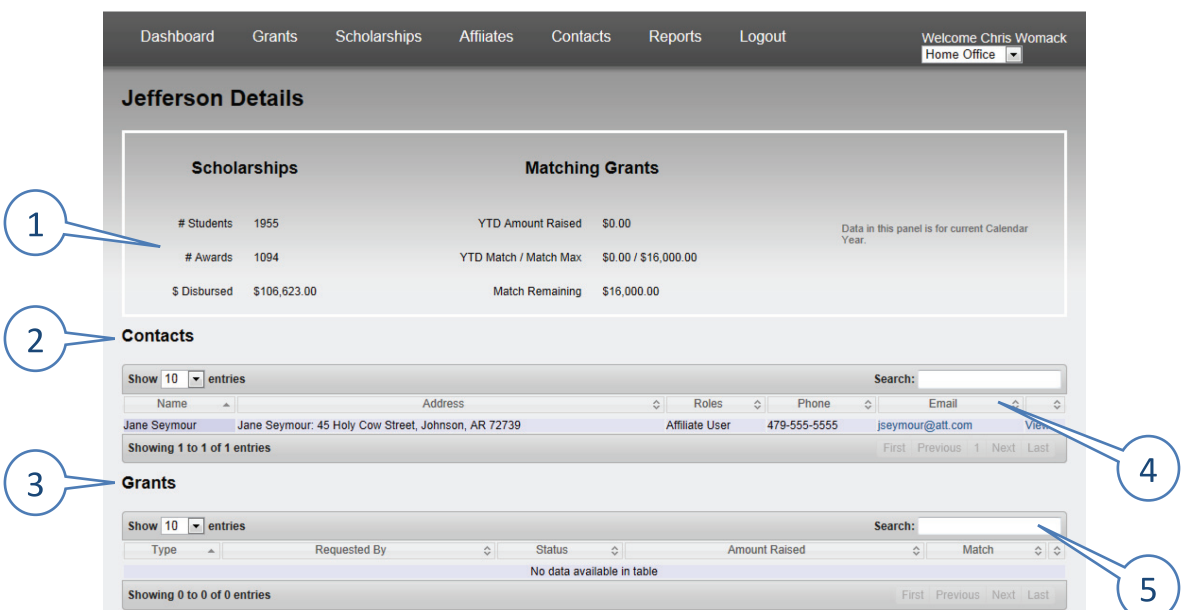

Figure 7 – (Top of screen) Affiliate Profile screen for a Managed Affiliate

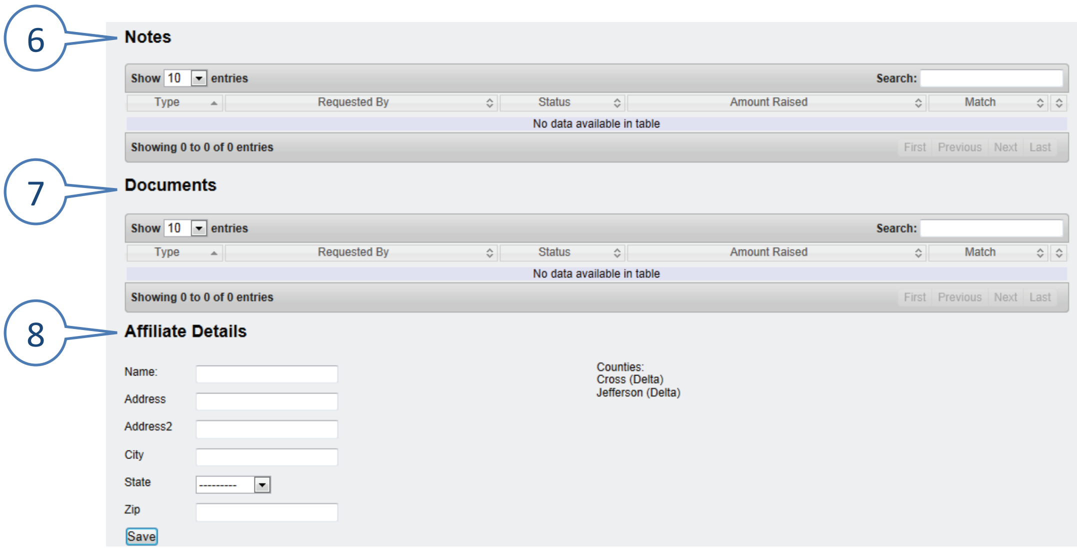

Figure 8 – (Bottom of screen) Affiliate Profile screen for a Managed Affiliate

1 – Affiliate's performance summary. This displays a year-to-date aggregate of each statistical indicator based on the affiliate's activity. Managed Affiliates have more indicators than Non-managed Affiliates, due to the amount of information aggregated in the System for each type of Affiliate. Each indicator is explained below:

- **# Students** displays the total number of students who've been awarded a scholarship within the affiliate's service area. This indicator is only available for Managed Affiliates.
- **# Awards** displays the total number of scholarships awarded within the affiliate's service area. This indicator is only available for Managed Affiliates.
- **$ Disbursed** displays the total dollars in scholarships disbursed within the affiliate's service area. This indicator is only available for Managed Affiliates.
- **YTD Amount Raised** displays the total dollars raised by the Affiliate year-to-date as reported on matching grant requests submitted by them throughout the year.
- **YTD Match / Match Max** displays the total dollars granted to the Affiliate by ASPSF year-to-date in match of local fundraising efforts.
- **Match Remaining** displays the year-to-date difference between the maximum amount of matching funds available to the Affiliate for the year and the total matching funds they have received.

2 – Affiliate membership roster. The Contacts table displays all current board members, staff, and affiliate members involved with this Affiliate's program. Email addresses appearing in the Email column of the table are hyperlinked. Clicking any email link will open a new email message window, and the address clicked will appear in the To: field of the new message. This requires email software to be pre-installed on the user's computer and does not work with web mail, like Yahoo! Mail. Click the **View** link next to any Contact record to edit contact information, logon credentials, and roles.

3 –Matching grant records. The Grants table displays all matching grant history for the selected Affiliate. These records can be edited by clicking the **Edit** link next to any record. Enter new matching grant transactions by using the Grants dashboard instead of the Affiliate Profile dashboard.

4 - Sorting. Any columns in any tables displayed on the Affiliates Profile screen may be sorted in ascending or descending order simply by clicking anywhere in the column header area. Only one column at a time may be sorted. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

5 - Searching. Each table displayed on this screen has its own search field, which can be used to search any content displayed in the respective table. Searchable content include record data, as well as any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

6 – Manage notes. The Notes table displays all existing notes relevant to the Affiliate. Notes may be created by ASPSF staff or an Affiliate member. Notes such as those created during the scholarship review process will not appear in this table. Notes are visible to all of the affiliate's members.

7 – View important electronic documents. The Documents table is intended to be used as a repository for the Affiliate's important and permanent organizational documents, such as the Affiliate Agreement, Bylaws, etc, that are not of a personal or private nature. Any electronic document can be uploaded or downloaded from this table by Affiliate members or ASPSF staff. Supporting documents for matching grant requests should not be stored in this table and should be submitted to ASPSF via email, mail, or fax. Supporting documents related to a specific student that are of a private or personal nature should be managed from within a specific scholarship application.

8 – Affiliate Details. This area captures the official contact information for the affiliate organization (if applicable). Official contact information is the information that remains consistent, regardless of turnover in leadership.

CONTACTS

All Home Office and Affiliate users have access to a Contacts Dashboard. The records displayed are only those relevant to the service area chosen from the Role Selector Box.

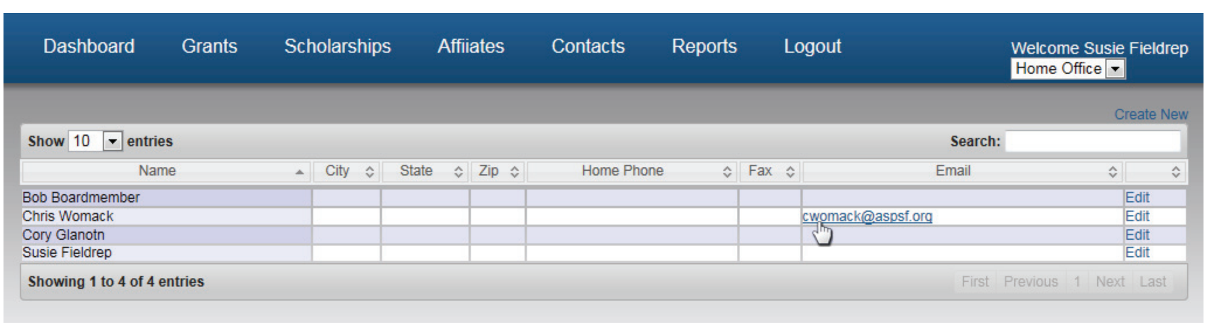

Figure 9 – the Contacts Dashboard

Create New. Use the **Create New** link to add new members to the service area indicated in the Role Selector box. Review the list of Roles on pages 6-7 to select an appropriate Role for the new contact. See **Contact Detail Dashboard** below to assign logon credentials to a new contact.

Email Addresses. The email addresses displayed in the Email column of the Contact table are hyperlinked. Email addresses appearing in the Email column of the table are hyperlinked. Clicking any email link will open a new email message window, and the address clicked will appear in the To: field of the new message. This requires email software to be pre-installed on the user's computer and does not work with web mail, like Yahoo! Mail.

The Contacts Dashboard replaces the ASPSF requirement for affiliates to submit the Board of Directors Information Update form.

Sorting. All columns of the Contacts table may be sorted in ascending or descending order. Only one column may be sorted at a time. Click anywhere in the column header to sort that column. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

Searching. The search field can be used to search any content displayed in the Contact table. Searchable content includes any data or links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

Editing contact records. Click the **Edit** link next to any record in the Contact table to view more detailed information about the individual or revise data contained in the record. See **Contact Detail Dashboard** below.

Printing contact lists and mail merge. Contact information can be mail merged to create personalized letters, mailing labels, name tags, and other merged information. Read more about this in the Reports dashboard section on page 19-21.

CONTACT DETAIL DASHBOARD

The details of an existing contact record may be viewed or edited by clicking the **Edit** link next to their record on the Contact dashboard. This opens the Contact Detail dashboard. To edit a record or to add new information to an existing record, make the necessary revisions then click the **Save** button to save changes.

Request a Password Reset. Many of the contact records stored in the Scholarship Management System will have certain roles assigned that give the individual access to certain information in the System. This access is permitted only if the person also has a set of Logon Credentials that allows them to sign into the System.

If a user forgets a password, it may be reset using the Change Password Request found in the Logon Credentials area of the screen. Click the **Request a Password Reset** link. This sends a system-generated email to the address recorded in the Contact Details section of the screen. The

The Change Password Request sends a reset link via email to the address stored in the user's contact record. Be sure stored email addresses are valid. This link is only valid for 24 hours.

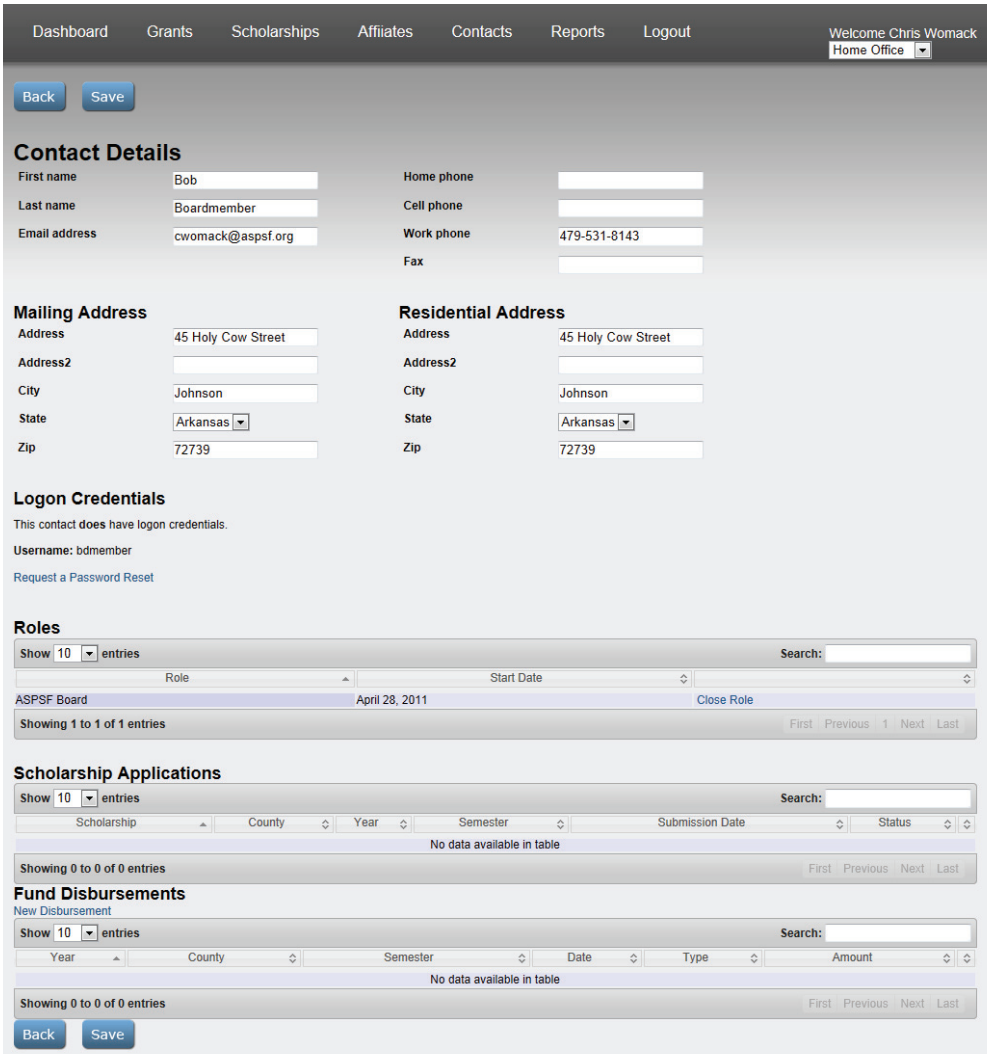

Figure 10 – Contact Detail screen

email message contains a link which the user must click to change the password. **This email link is only valid for 24 hours.**

Deactivate a User's Logon Credentials. To disable a user's ability to sign into the Scholarship Management System, click the **Close Role** link next to the appropriate user role listed in the Roles table. Users are only able to close their own Role and the Roles of others who's privileges are at the same level as their own or lower.

Scholarship Applications and Fund Disbursements Sections. Some current Affiliate members may be former Single Parent Scholarship applicants and/or recipients. If so, a list of their scholarship applications and disbursement activity will be listed in these sections.

REPORTS

The Reports Dashboard offers users a way to generate custom lists of records and aggregate reports on any records to which they are permitted access. This permission is derived from their assigned user roles in the System.

Reports generated using this dashboard are displayed in the same window at the bottom of the screen. Report data may be searched and sorted. Users may also use the collection of icons located above the top-right margin of the report display area to export or print the report. See **Exporting and Printing Reports** below for more information.

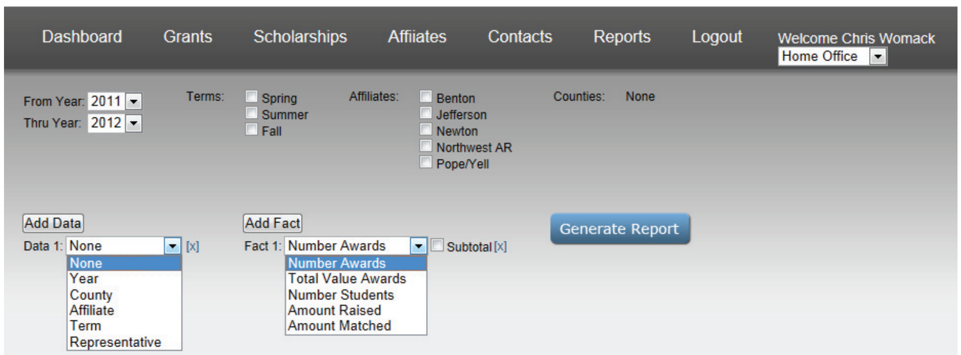

Figure 11 – Home Office users Reports Dashboard

From Year / Thru Year. The year dates range from the year in which the first records were recorded in the System through to the present date.

Terms. Terms refers to semesters. The available list of Terms is relevant to the service area selected in the Role Selector field. Spring, Summer, and Fall is relevant to the entire ASPSF network, while a specific affiliate may only list Spring and Fall terms.

Affiliates. This criteria is only available to Home Office users, who may choose from one or more affiliates to include on the report.

Counties. The available list of Counties depends on which affiliates are selected in the Affiliates section.

Data. An optional field used to define the order by which report data will be organized (e.g. by year, by county, by semester, etc.) To add a Data criterion to the report, select it from the drop-down. To add additional Data, click the **Add Data** button and select a criterion from the new drop-down field. To remove a Data criterion, click the **X** link adjacent to the item.

Facts. An optional field used to select the types of data to query and display in the report. To add a Fact criterion to the report, select it from the drop-down. To add additional Facts, click the **Add Fact** button and select a criterion from the new drop-down field. To remove a Fact criterion, click the **X** link adjacent to the item. One or more Facts may be subtotaled by clicking the checkbox next to each Fact.

Exporting or Printing Reports. Once a report has been generated and results are visible in the data display area at the bottom of the window, the data may be printed or exported by clicking one of the icons above the top-right margin of the display area.

Figure 12 – Copy, Export, and Print icons

1 – Copy/Paste Command. The Copy command allows the user to copy and paste the contents of the table into an external document, like an email, a Microsoft Word document, etc.

2 - Exporting Commands. Two types of Export commands are available – export as a CSV and export as a Microsoft Excel file. Either format enables the data to be imported into a spreadsheet application, like Microsoft Excel. CSV files in particular may be imported into word processing, spreadsheets, or database applications. Either of these formats allows the user to further analyze and manipulate the data in a tabular format. Read more below about manipulating report data and creating mailing labels.

3 - Printing Reports. The Print command sends the contents of the table to a printer if one is accessible from the user's computer. The Print command can also be used to convert the report into a PDF document. For this to work, Adobe Acrobat Professional or other third-party PDF conversion software must be installed on the user's computer.

Manipulating report data in a spreadsheet.

1. Create a desired report and export it into a new spreadsheet.
2. Create any necessary formulas to aggregate or analyze the data in the spreadsheet.
3. Use the spreadsheet application's built-in graphing tools to create attractive bar graphs or charts using the data in the spreadsheet. Or dress up the format of the tabular layout and copy and paste into reports to funders or promotional materials.

Mail merge and creating mailing labels.

1. Create a report listing the names and contact information of individuals.
2. Export this list into a spreadsheet, such as Microsoft Excel.
3. Review and edit the list as necessary.
4. Save the spreadsheet to your computer's Desktop or other location that can be found easily later. Close the spreadsheet application.
5. Open Microsoft Word or other third-party word processing application that has a built-in mail merge command. Create a new letter, mailer or mailing label. At the appropriate step in the merge process, browse and select the new spreadsheet containing the mailing list as the source file for the merge.
6. Complete the merge and print.

Querying and aggregating responses to custom questions included on scholarship applications. An applicant who attends the University of Arkansas may record the school name on her scholarship application as U of A or UALR or University of Arkansas. The System will recognize these as three different schools instead of the same school. For this reason, the Reports Dashboard of the Scholarship Management System is not able to aggregate free-form text responses collected on scholarship applications.

It is possible to work around this issue by aggregating responses using a spreadsheet application like Microsoft Excel:

1. Create a report listing the responses to desired questions and any other necessary data. Export the list into a spreadsheet application like Microsoft Excel.
2. Use the spreadsheet application's Search and Replace functions to normalize the data. That is, search for and replace all variations of the same response (e.g. U of A Little Rock, UALR, U of A LR) with a consistent value (e.g. UALR).
3. Apply any desired formulas (e.g. use Excel's COUNT() function to tally the number of students who attend UALR)

AFFILIATE ROLES

This section pertains to the roles of an Affiliate board member, volunteer or fiscal sponsor representative. It also pertains to ASPSF staff who has been given rights by an Affiliate Administrator to access the Affiliate's records in the role of an Affiliate board member.

LOGGING INTO THE SYSTEM

Read about creating users, deactivating user accounts, and resetting passwords in the Contact dashboard section on pages 37-41. When logged in, the user's name as it appears in the user's contact record is displayed in the upper-right area of the screen.

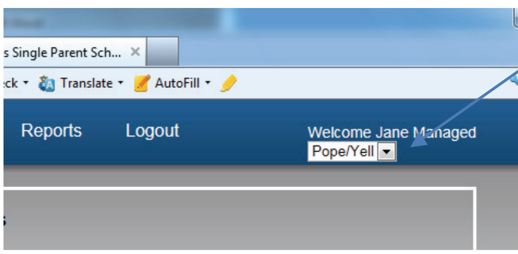

Figure 13 – Role Selector Box

Role Selector field. If the user has been assigned more than one role in the system, the user can choose between the roles using the Role selector box. The available dashboards and tools, and the color scheme may change depending on the role selected.

Users are assigned privileges according to their role or the tasks they must perform within the Affiliate organization. Some users may be assigned more than one role or to more than one Affiliate. Such users will have multiple Roles from which to choose in the Role Selector field.

MAIN DASHBOARD

The Main Dashboard (like a home page) is the initial screen a user sees upon logging in. Users who have multiple roles in the System will be re-directed to this screen each s/he chooses a different role from the Role Selector field.

The purpose and layout of the Main Dashboard is distinctly different depending on the user's Affiliate:

- Users of Managed Affiliates see the Affiliate's basic performance summary, a list of submitted scholarship applications that are in the process of being reviewed and decided, and a table of Alerts.
- Users of Non-managed Affiliates see a screen identical to the Affiliates dashboard. Read about the Affiliate dashboard on page 28-30 for more information.

MAIN DASHBOARD FOR MANAGED AFFILIATES

This section pertains only to Affiliates that use the Scholarship Management System to manage scholarship and program activity. This screen has been designed to provide a very basic aggregate program summary, a

place to begin the scholarship application review process, and a place to manage important alerts from fellow members and ASPSF staff.

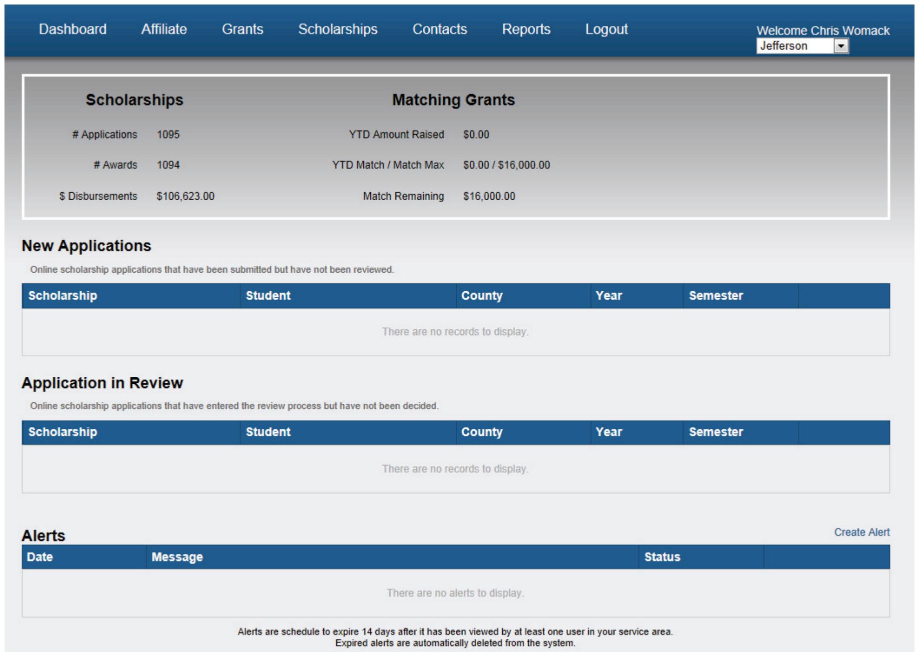

Figure 14 – Managed Affiliates Main Dashboard

The data displayed at the top of this screen is relevant to the service area covered by the current role selected in the Role Selector field. They provide a year-to-date aggregate for the service area for each indicator listed. To view more detailed statistics and view statistics for a custom range of time, read about the Reports dashboard on pages 42-44.

Below are brief descriptions for each statistical indicator displayed on the main Dashboard:

 # Applications displays the calendar year-to-date total number of online scholarship applications submitted through the Scholarship Management System for the service area indicated in the Role Selector Box.

 # Awards displays the year-to-date total number of scholarships awarded within the service area indicated in the Role Selector Box.

$ Disbursements displays the year-to-date total dollars in scholarships ***paid out*** by the Affiliate indicated in the Role Selector Box.

YTD Amount Raised displays the year-to-date total dollars raised by the Affiliate, only as reported on the Matching Grant Request forms.

If an affiliate awards a $500 scholarship but only records disbursements totaling $250, “Disbursement $ Value” will only show $250.

YTD Match / Match Max displays the year-to-date total amount of matching grants the Affiliate was awarded, compared to the maximum matching grant amount the Affiliate is eligible to receive.

Match Remaining displays the calculated difference between the YTD Match and Maximum Match.

REVIEWING APPLICATIONS

The main Dashboard is the window from which Managed Affiliate users may begin the review process for all scholarship applications submitted online through the Scholarship Management System.

Applications submitted by students will be listed on this screen, only if:

1. the Affiliate elects to offer an online application to its students,
2. the Affiliate creates a new scholarship opportunity in the System that has an unexpired deadline,
3. the Affiliate creates a scholarship application form through the System,
4. the Database Administrator places a link to the scholarship opportunity on the Affiliate's web page hosted at http://www.aspsf.org

Scholarship applications are automatically "received" by an Affiliate based on the county the student selects in the Student Profile section of their scholarship application. This determines the Affiliate to which each student record is assigned.

Once an application is submitted by a student, the application record appears on the assigned Affiliate's the New Applications table on the Main Dashboard. New applications that haven't been opened by an Affiliate user will be visible to the student through his/her profile and appear with a status of "Submitted".

Affiliate users may begin reviewing a scholarship application by clicking the **Review** link next to it in the New Application table. One or more Affiliate users may open and review a single application. Reviews may be done collaboratively or independently, either incrementally over time or during a single session.

Once a scholarship application is under review, the student will see the application status updated to "Under Review". On the main Dashboard, the scholarship record will disappear from the New Applications table and appear in the Applications in Review table.

If the review process is not complete before the user's session ends, the same or another fellow member can finish reviewing the application later by clicking the **Continue Review** link next to the application in the Applications in Review table.

Once the review is complete and a decision is recorded to either approve or deny the application, the application record disappears from the main Dashboard. The application still appears on the Scholarships dashboard and in the student's Contact Detail record.

The Application Review window (see Fig. 15) is a visual copy of the student's online scholarship application, separated into the various sections of the scholarship application. Each Section must be approved by an affiliate member. This is done by clicking the **Approve Section** button located above each Section. Each Section collapses as it is approved and the information is hidden until the Affiliate user clicks the **View** button above the Section. The Affiliate user can collapse the Section again by clicking the **Hide** button.

Members may also un-approve sections that were previously approved by clicking the **Unapprove** button next to a Section.

As each Section is approved, the System logs the action as a new Note. Affiliate users may also create custom Notes to log additional information and remarks about the student, the scholarship application, the student's

interview performance, etc. These Note records become part of the application's record and are visible to fellow Affiliate users who share access to this information.

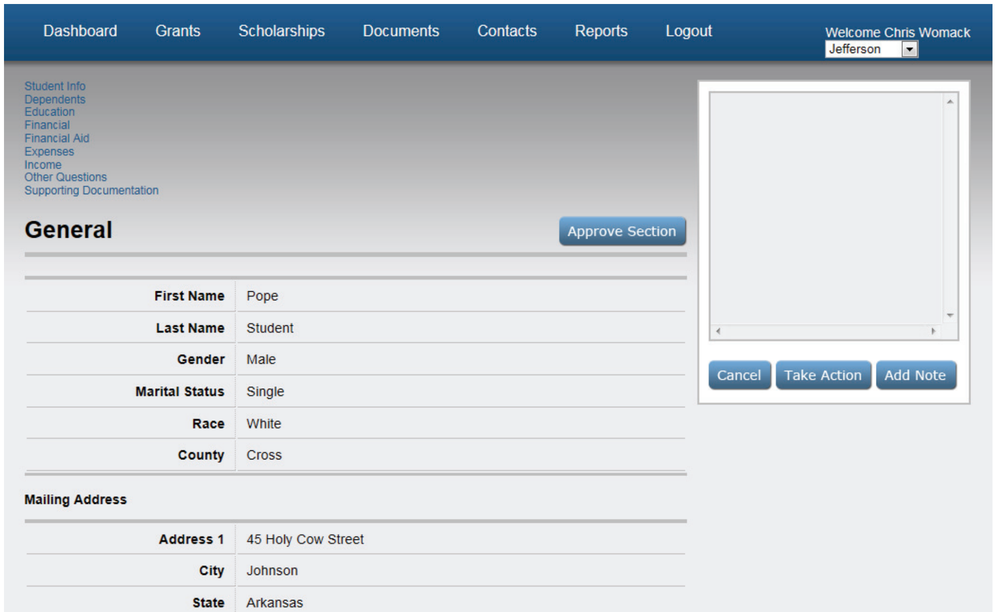

Figure 15 – Scholarship Application Review screen

Once all Sections have been approved, the scholarship application may then be approved or rejected. A record of this decision is made by clicking the **Take Action** button located beneath the Notes box and selecting either "Award" or "Deny". Click the **Submit** button to complete the decision. The student may then see the updated status of the application.

When a scholarship application is approved, this means it has been awarded. It does not indicate it has been disbursed or paid out. The Scholarship Management System records an award and a disbursement separately, and many statistical indicators in the System use disbursement activity to indicate the total dollar value of scholarships granted to students. Once a scholarship application has been awarded, Affiliate users will need to record disbursements for their students. Read more about this on page 38-39.

ALERTS

The Scholarship Management System offers a very basic messaging system for ASPSF staff and Managed Affiliates. Users may post important messages that appear on the Main Dashboard of all users in a selected service area. Alerts are not private messages. Once an alert message has been opened by any single user, the message is set to automatically disappear (expire) after 14 days.

Alerts are not private and may be viewed by all users within the user's service area.

Creating an alert. Click the **Create Alert** link located above the top-right margin of the Alerts table on the Main Dashboard. Select either "Home Office" or an affiliate from the Service Area field.

Viewing an alert. The Alerts table displays all existing Alerts corresponding to the user's currently selected role. New Alerts appear in bold type with shaded table cells and have a status of "New". Click the **View** link next to any message to open the message. Once an Alert has been opened by any one user from the same service area, the message status changes to "Read", and the message is set to automatically expire after 14 days.

MAIN DASHBOARD FOR NON-MANAGED AFFILIATES

This section pertains only to Affiliates that use the Scholarship Management System to report required information to ASPSF. This screen has been designed to allow users to quickly review the Affiliate's profile and update information. It is designed exactly like the Affiliate Dashboard that is available to Managed Affiliates.

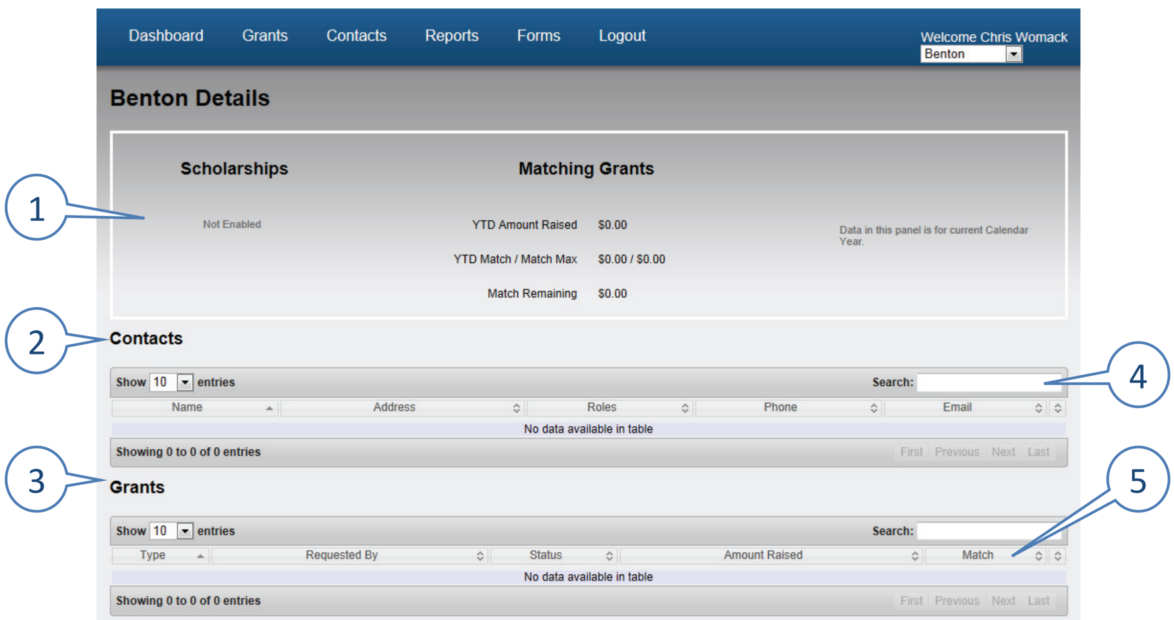

Figure 16 – (Top of screen) Non-managed Affiliates Main Dashboard

1 – Affiliate's performance summary. This displays a year-to-date aggregate of each statistical indicator based on the affiliate's activity. Each indicator is explained below:

- **Scholarships indicators** are disabled since Non-managed Affiliates do not track their scholarship data in the System.
- **YTD Amount Raised** displays the total dollars raised by the Affiliate year-to-date as reported on matching grant requests submitted by them throughout the year.

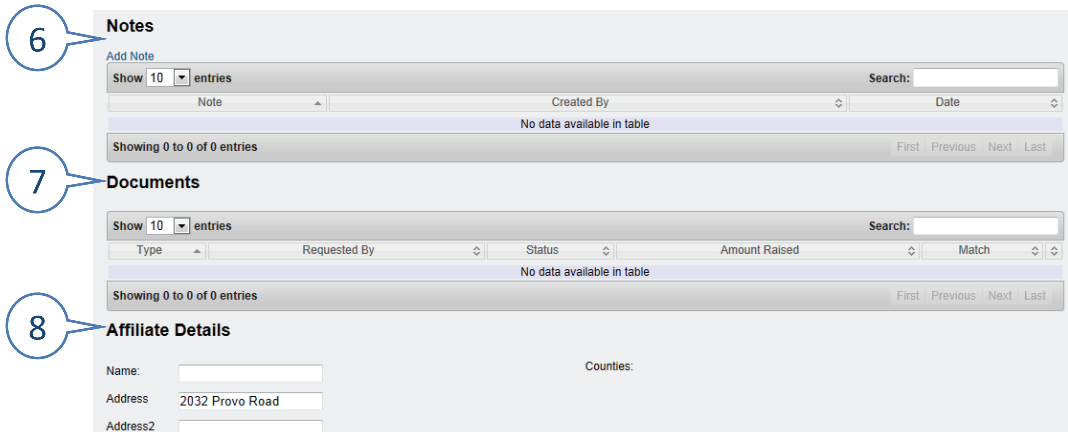

Figure 17 – (Bottom of screen) Non-managed Affiliates Main Dashboard

- **YTD Match / Match Max** displays the total dollars granted to the Affiliate by ASPSF year-to-date in match of local fundraising efforts.
- **Match Remaining** displays the year-to-date difference between the maximum amount of matching funds available to the Affiliate for the year and the total matching funds they have received.

2 – Affiliate membership roster. The Contacts table displays all current board members, staff, and affiliate members involved with this Affiliate's program. Email addresses appearing in the Email column of the table are hyperlinked. Clicking any email link will open a new email message window, and the address clicked will appear in the To: field of the new message. This requires email software to be pre-installed on the user's computer and does not work with web mail, like Yahoo! Mail. Click the **View** link next to any Contact record to edit contact information, logon credentials, and roles.

3 –Matching grant records. The Grants table displays all matching grant history for the selected Affiliate. These records can be edited by clicking the **Edit** link next to any record. Enter new matching grant transactions by using the Grants dashboard instead of the Affiliate Profile dashboard.

4 - Searching. Each table displayed on this screen has its own search field, which can be used to search any content displayed in the respective table. Searchable content include record data, as well as any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

5 - Sorting. Any columns in any tables displayed on the Affiliates Profile screen may be sorted in ascending or descending order simply by clicking anywhere in the column header area. Only one column at a time may be sorted. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

6 – Manage notes. The Notes table displays all existing notes relevant to the Affiliate. Notes may be created by ASPSF staff or an Affiliate member. Notes such as those created during the scholarship review process will not appear in this table. Notes are visible to all of the affiliate's members.

7 – View important electronic documents. The Documents table is intended to be used as a repository for the Affiliate's important and permanent organizational documents, such as the Affiliate Agreement, Bylaws, etc, that are not of a personal or private nature. Any electronic document can be uploaded or downloaded from this table by Affiliate members or ASPSF staff. Supporting documents for matching grant requests should not

be stored in this table and should be submitted to ASPSF via email, mail, or fax. Supporting documents related to a specific student that are of a private or personal nature should be managed from within a specific scholarship application.

8 – Affiliate Details. This area captures the official contact information for the affiliate organization (if applicable). Official contact information is the information that remains consistent, regardless of turnover in leadership.

AFFILIATES

The Affiliates Dashboard is accessible to Managed Affiliates. You may notice this screen is similar to the Main Dashboard for Non-managed Affiliates described in the last section.

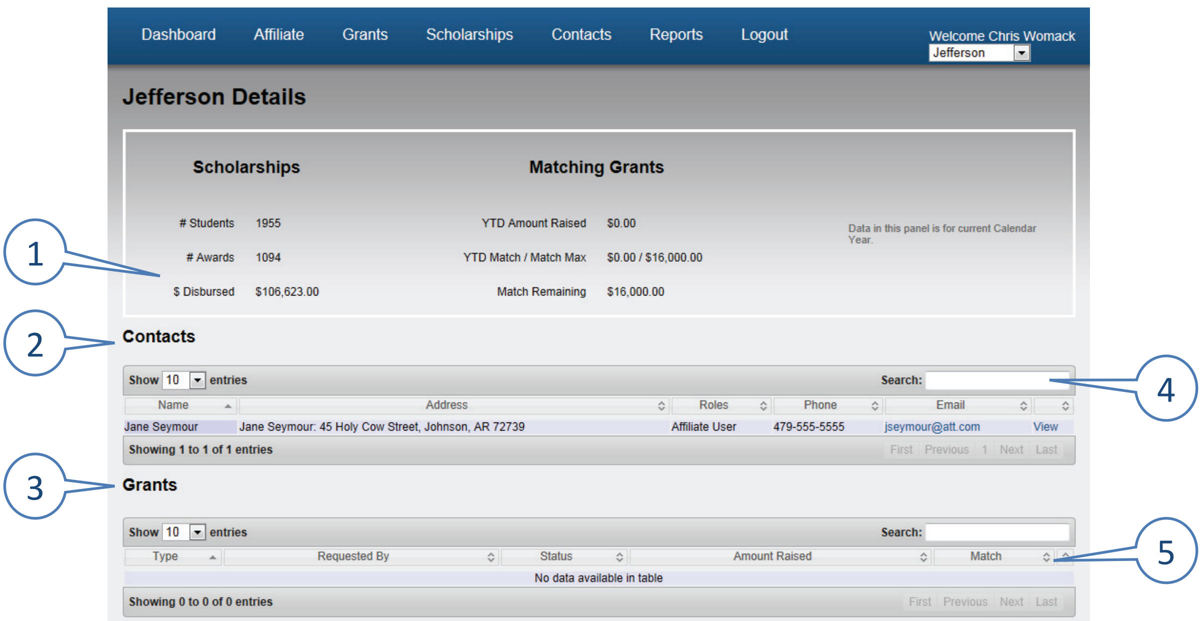

Figure 18 – (Top of screen) Affiliate Profile screen

1 – Affiliate's performance summary. This displays a year-to-date aggregate of each statistical indicator based on the affiliate's activity. Each indicator is explained below:

- **# Students** displays the total number of students who've been awarded a scholarship within the affiliate's service area. This indicator is only available for Managed Affiliates.
- **# Awards** displays the total number of scholarships awarded within the affiliate's service area. This indicator is only available for Managed Affiliates.

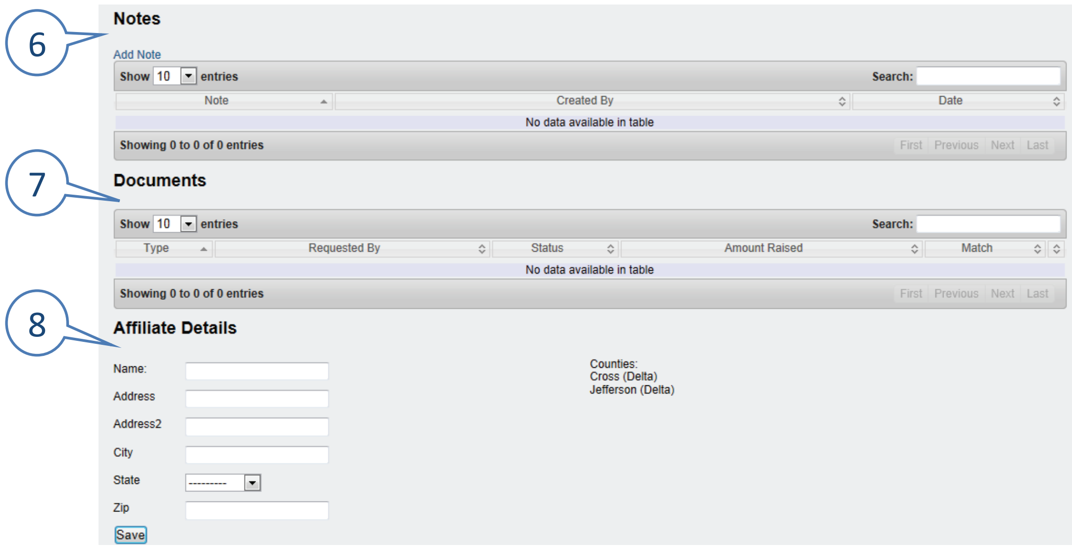

Figure 19 – (Bottom of screen) Affiliate Profile screen

- **$ Disbursed** displays the total dollars in scholarships disbursed within the affiliate's service area. This indicator is only available for Managed Affiliates.
- **YTD Amount Raised** displays the total dollars raised by the Affiliate year-to-date as reported on matching grant requests submitted by them throughout the year.
- **YTD Match / Match Max** displays the total dollars granted to the Affiliate by ASPSF year-to-date in match of local fundraising efforts.
- **Match Remaining** displays the year-to-date difference between the maximum amount of matching funds available to the Affiliate for the year and the total matching funds they have received.

2 – Affiliate membership roster. The Contacts table displays all current board members, staff, and affiliate members involved with this Affiliate's program. Email addresses appearing in the Email column of the table are hyperlinked. Clicking any email link will open a new email message window, and the address clicked will appear in the To: field of the new message. This requires email software to be pre-installed on the user's computer and does not work with web mail, like Yahoo! Mail. Click the **View** link next to any Contact record to edit contact information, logon credentials, and roles.

3 –Matching grant records. The Grants table displays all matching grant history for the selected Affiliate. These records can be edited by clicking the **Edit** link next to any record. Enter new matching grant transactions by using the Grants dashboard instead of the Affiliate Profile dashboard.

4 - Searching. Each table displayed on this screen has its own search field, which can be used to search any content displayed in the respective table. Searchable content include record data, as well as any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

5 - Sorting. Any columns in any tables displayed on the Affiliates Profile screen may be sorted in ascending or descending order simply by clicking anywhere in the column header area. Only one column at a time may be sorted. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

6 – Manage notes. The Notes table displays all existing notes relevant to the Affiliate. Notes may be created by ASPSF staff or an Affiliate member. Notes such as those created during the scholarship review process will not appear in this table. Notes are visible to all of the affiliate's members.

7 – View important electronic documents. The Documents table is intended to be used as a repository for the Affiliate's important and permanent organizational documents, such as the Affiliate Agreement, Bylaws, etc, that are not of a personal or private nature. Any electronic document can be uploaded or downloaded from this table by Affiliate members or ASPSF staff. Supporting documents for matching grant requests should not be stored in this table and should be submitted to ASPSF via email, mail, or fax. Supporting documents related to a specific student that are of a private or personal nature should be managed from within a specific scholarship application.

8 – Affiliate Details. This area captures the official contact information for the affiliate organization (if applicable). Official contact information is the information that remains consistent, regardless of turnover in leadership.

GRANTS

The Grants dashboard shows all matching grant activity for the service area selected in the Role Selector Box. Matching grant transactions may only be recorded by Home Office users (ASPSF staff). Matching grant requests, along with all supporting documentation, must be submitted to ASPSF via email, fax, or mail.

Below is a brief explanation of each column displayed on this screen:

Requested By is the person who prepared or submitted the request for match.

Type is the type of grant request. Currently, the only grant type tracked in the System is matching grants.

Request Date is the date on which the Affiliate representative signed the matching grant request.

Approval Date is the date on which ASPSF approved the matching grant request. Transactions are recorded with an approval date if ASPSF has approved or denied a grant. "Pending" appears in the Approval Date column if ASPSF has not made a grant decision.

$ Raised is the total dollar amount raised by the Affiliate as indicated on the matching grant request form.

Amount (or **Goal Amount**) is the dollar amount of the grant award approved by ASPSF and paid to the Affiliate.

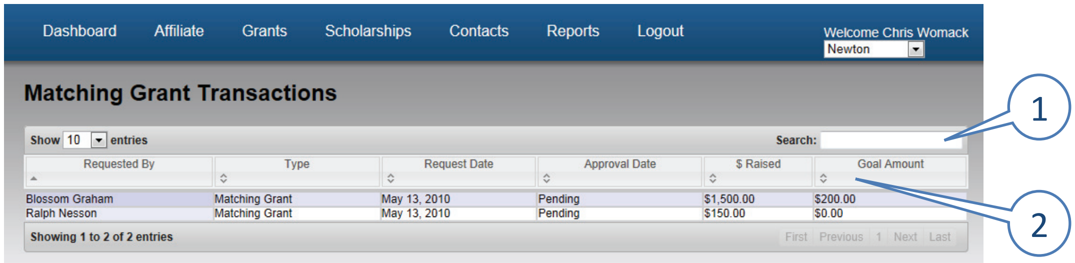

Figure 20 – Affiliate users Grants Dashboard

1 - Using the search field. Searchable content includes dollar values, dates, text, and any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

2 - Sorting table columns. All columns of the matching grants table may be sorted in ascending or descending order. Only one column may be sorted at a time. Click anywhere in the column header to sort that column. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

SCHOLARSHIPS

The Scholarship Dashboard provides a set of tools for Affiliates to use to create new scholarship opportunities, configure an online scholarship application form, and manage all scholarship activity. This Dashboard is only accessible to Managed Affiliates.

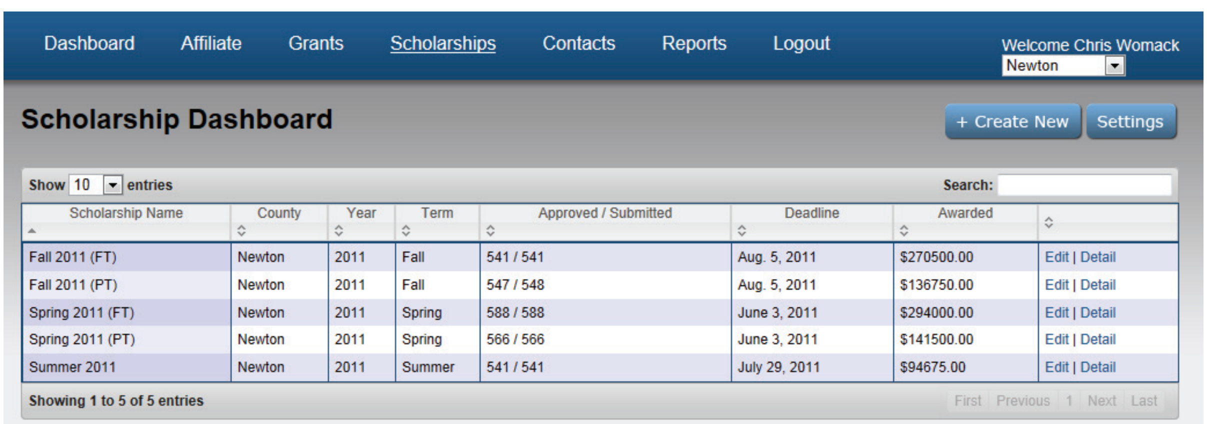

Figure 21 – Affiliate users Scholarships Dashboard

The Scholarship Dashboard displays a list of all scholarship cycles managed by the Affiliate. A cycle refers to the period of time in which the scholarship is offered.

In Figure 21 above, all records associated with the 556 applicants who were awarded $111,200 are all associated with the scholarship cycle titled “Spring 2011”. Click the **Detail** link next to the cycle to see a list of all students who applied during this cycle. Users who have access to private student data may also drill down further to access each actual scholarship application. Read more about the Scholarship Detail dashboard on pages 35-37.

Managing scholarship activity through the Scholarship Dashboard replaces the ASPSF requirement for affiliates to submit Scholarship Award Reports each semester.

Below is a brief explanation of each column displayed on this screen:

Scholarship Name is a descriptive name given to each scholarship cycle when created. This name is visible to students and to visitors of the Affiliate web page.

County is the service area(s) to which the scholarship applies. More than one county may be designated per scholarship.

Year is the year date designated for the scholarship cycle.

Term is the semester or period designated for the scholarship cycle

Approved / Submitted is the total number of online scholarship applications approved, compared to the total number of online applications submitted for the scholarship cycle.

Deadline is the date by which online scholarship applications must be submitted and the date on which the application period ends. After this date, the link to the online application is de-activated.

The Awarded column displays is the amount that the Affiliate has approved to be awarded, but not necessarily the amount the Affiliate actually disbursed. This value is tied to the Award amount recorded in the Scholarship Cycle settings and to the “Approved” status of each awarded application.

Awarded is the total dollars in scholarship awards for the cycle that have been approved by the Affiliate. This value does not indicate the total dollars actually paid out (disbursed).

Edit | Detail are two links enabling Affiliates to manage each scholarship cycle. Edit provides the Affiliate access to a tool to view or edit the terms of the scholarship cycle. Detail provides a detailed list of the individual students who applied for the cycle.

Sorting. All columns of the Scholarship table may be sorted in ascending or descending order. Only one column may be sorted at a time. Click anywhere in the column header to sort that column. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

Searching. Searchable content includes affiliate names, as well as any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

CREATING A SCHOLARSHIP APPLICATION

Prospective applicants may apply for the Single Parent Scholarship using the Scholarship Management System, only if the Affiliate:

a) manages its scholarship records using the Scholarship Management System,
b) creates an online scholarship application,
c) creates at least one “open” scholarship cycle in the System (meaning the deadline hasn’t expired),
d) a link to the online scholarship application is accessible from the ASPSF website or other websites.

The first step in automating the scholarship cycle in the Scholarship Management System is to create an online application form. An application design tool is available through the Scholarship Dashboard, via the **Settings** button. The System only allows one application form to be designed per Affiliate. This form will be used for all scholarship cycles.

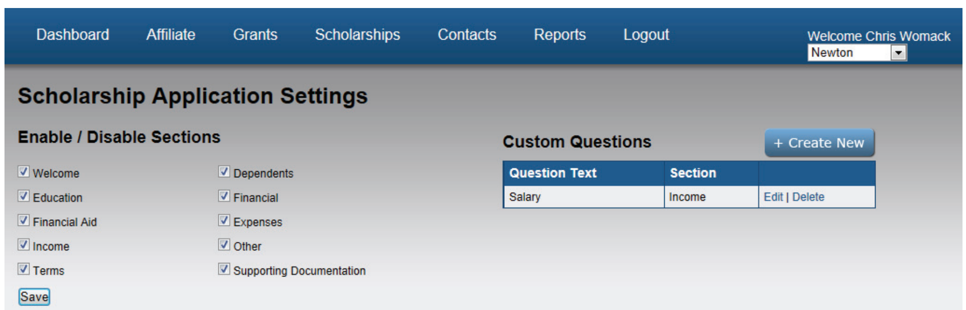

Figure 22 – Application Settings screen

Each check box under the “Enable/Disable” section is tied to each basic section of a scholarship application form. A checked field indicates the section will be included in the online form, while un-checked sections will be excluded from the form.

A set of pre-designed questions have been built into each section. This set of questions was developed based on an extensive review of more than fifty actual Affiliate applications. Default questions may not be edited. An unlimited number of custom questions may be created and included in each section.

Each section of the application is briefly described below:

Welcome – This section is the initial screen (like a home page) of the student’s application. It displays the Welcome text entered as part of the settings of each scholarship cycle.

General – This is a default section that is included in all online applications and is not configurable, other than to add custom questions. It is not included in the Settings window. This section collects general profile information from each applicant. When viewing an application submitted online, this section corresponds to the Student Info section of the application.

Dependents - This section collects the name, relationship, gender, and date of birth of the applicant’s dependents. It also collects the custody type for each dependent and whether or not the individual is covered by health insurance.

Education - This section collects the applicant’s current and prior education history: school name, area of study, dates of attendance, program type, and enrollment status.

Financial (or **Employment**) - This section collects the applicant's employment information

Financial Aid - This section collects the dollar amounts the applicant derived from various forms of financial aid.

Expenses – The questions for this section are customizable to collect applicants' household expense detail. Applicants will be required to record a dollar value for each expense item for "Last Semester", "This Semester", and "Next Semester".

Income – The questions for this section are customizable to collect applicants' household income detail. Applicants will be required to record a dollar value for each income item for "Last Semester", "This Semester", and "Next Semester".

Terms – This section collects applicants' agreement to the terms of scholarship support and their response to whether or not they grant SPSF permission to use personal information in promotional activities.

Supporting Documentation - This section enables students to upload electronic copies of the supporting documents required by the Affiliate. Affiliates customize a list of the documents they will accept. This list appears as options in a document Type field on the application. For each electronic document a student uploads, they must categorize it using one of the document Type options. Affiliates choose whether or not to require students to upload electronic forms of supporting documents. If it is possible for the Affiliate to scan hard copies of documents, they may upload them on behalf of a student. This can be done after the application has entered the Review phase, by using the upload tool in the Documentation section of the student's application. Student documentation is not a required part of the online scholarship application. This tool is designed only for the convenience of Affiliates, and it is each Affiliate's prerogative to utilize this tool.

Custom questions. Additional questions may be created by Affiliates using the **Create New** button. They may be edited or deleted by clicking the adjacent **Edit** or **Delete** links. Custom questions have a default response type of free-form text, meaning the applicant simply types in their response. Affiliates may select the "yes/no" (Boolean) response type, instead. Custom questions may be added to any section of the application except Welcome, Terms, and Supporting Documentation. Affiliates may require applicants to respond to a custom question by clicking the **Required** checkbox. Custom questions are added to specific scholarships through the Scholarship Cycle Settings window (read **Creating a New Scholarship**). The data collected from custom questions can be queried using the tools on the Reports Dashboard and aggregated by exporting the report to a 3rd party spreadsheet application (read about Reports).

Do not edit an existing scholarship cycle as a way to create a new cycle. Doing so will over-write all of the scholarship records from the previous cycle.

CREATING A NEW SCHOLARSHIP

Each scholarship cycle (semester and year) must have its own record and set of terms established in the Scholarship Management System in order for Affiliates to manage scholarship activity. Everything is tied to a specific scholarship record, from applications submitted by students to award disbursements. It is acceptable to edit a scholarship deadline to extend an application period when necessary.

Avoid re-opening a scholarship cycle from a prior semester as a substitute for creating a new scholarship cycle. This will over-write all existing records for the original scholarship cycle. For example, editing the terms of a Spring 2010 scholarship cycle to create a new

Spring 2011 cycle will over-write all of the application and award data tied to the Spring 2010 cycle.

The basic set of terms for a scholarship includes its title or name, year, semester, deadline, set award amount, and county service area.

- Create a new Scholarship Cycle by clicking the **+Create New** button on the Scholarship Dashboard (see Fig. 21)
- The title should be something like “Spring 2011”, etc.
- The “Term” is the semester in which awards will be applied.
- Custom questions are enabled or disabled for each individual scholarship. The questions themselves are created through the Application Settings screen.
- Default text, along with custom Welcome text appears on the first section of the online application.
- Click the **Save** button to record the scholarship cycle.

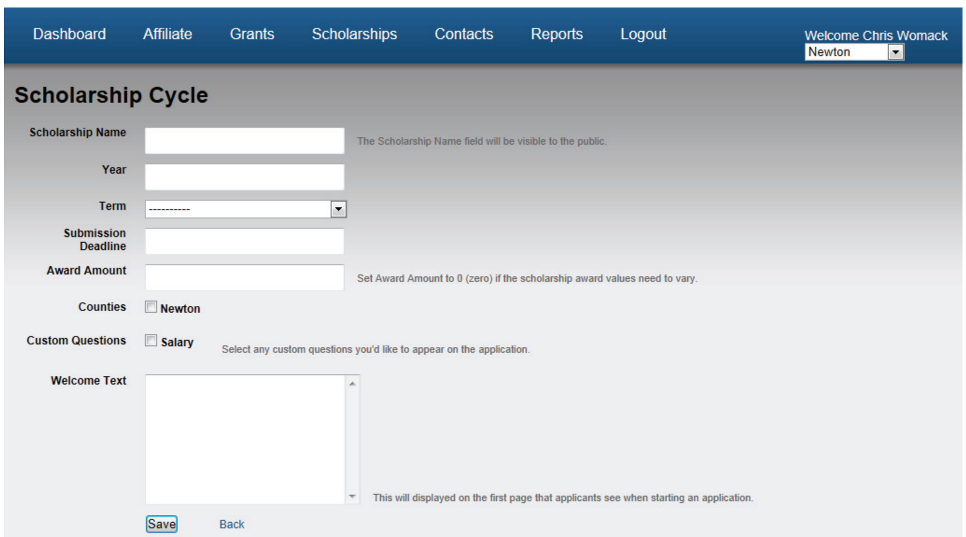

Figure 23 – Managed Affiliates Create New Scholarship Cycle Screen

SCHOLARSHIP DETAIL DASHBOARD

The Scholarship Detail dashboard shows a list of students who submitted applications during a specific scholarship cycle, along with the submission date and award status. It also displays aggregate statistics about the cycle.

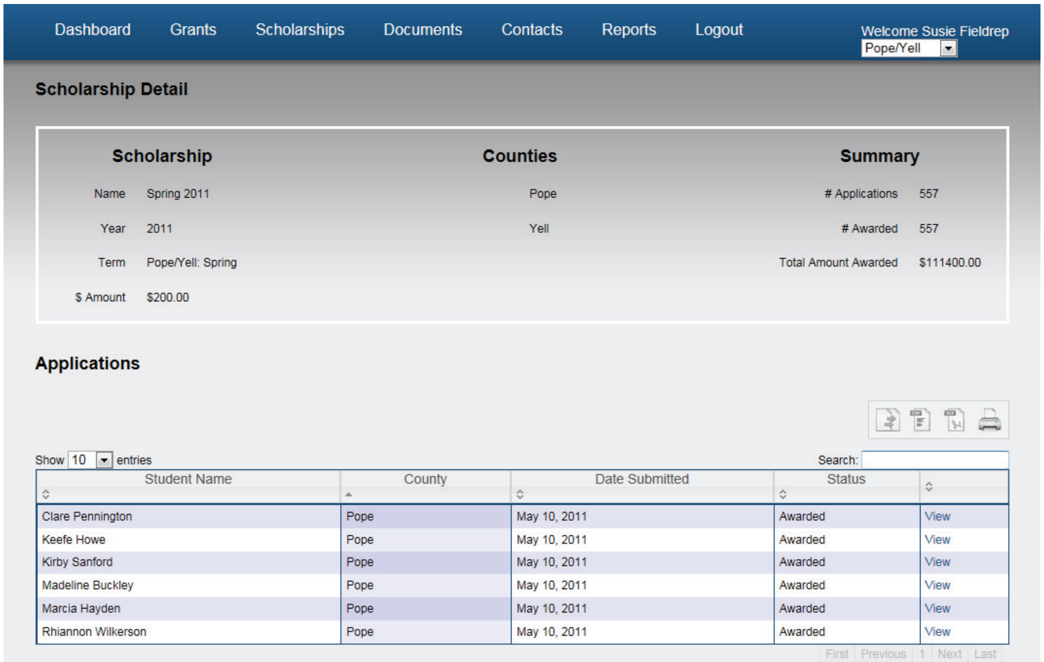

Figure 24 – Scholarship Detail dashboard

Sorting. All columns of the Scholarship Detail table may be sorted in ascending or descending order. Only one column may be sorted at a time. Click anywhere in the column header to sort that column. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

Searching. Searchable content includes affiliate names, as well as any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

Exporting or Printing Scholarship Detail. The list of records displayed on the Scholarship Detail dashboard may be printed or exported by clicking one of the icons above the top-right margin of the display area.

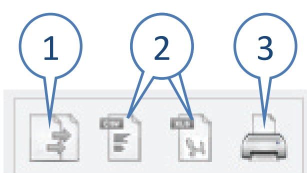

Figure 25 – Copy, Export, and Print icons

1 – Copy/Paste Command. The Copy command allows the user to copy and paste the contents of the table into an external document, like an email, a Microsoft Word document, etc.

2 - Exporting Commands. Two types of Export commands are available – export as a CSV and export as a Microsoft Excel file. Either format enables the data to be imported into a spreadsheet

application, like Microsoft Excel. CSV files in particular may be imported into word processing, spreadsheets, or database applications. Either of these formats allows the user to further analyze and manipulate the data in a tabular format. Read more below about manipulating report data and creating mailing labels.

3 - Printing Reports. The Print command sends the contents of the table to a printer if one is accessible from the user's computer. The Print command can also be used to convert the report into a PDF document. For this to work, Adobe Acrobat Professional or other 3rd party PDF conversion software must be installed on the user's computer.

Each individual scholarship application submitted during the cycle may be opened by clicking the **View** link adjacent to each record. This reveals all of the responses recorded by the applicant, along with any notes recorded by Affiliate users and a log of those who participated in the review process. It also reveals any electronic supporting documents uploaded to the System by the applicant or Affiliate users during the application and review process.

A record of award disbursements for each scholarship award is accessed through each students' profile on the Contacts dashboard.

CONTACTS

The Contacts Dashboard shows a list of all members and students who are associated with the Affiliate, including board members, employees, volunteers, and students. The list of people are divided into two lists: Contacts (who are the Affiliate's members and have direct involvement with the SPSF) and Students (or applicants).

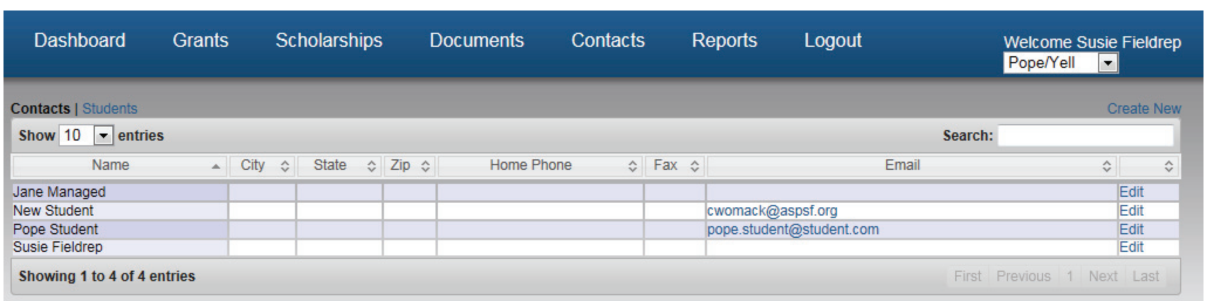

Figure 26 – the Affiliate Contacts Dashboard

Email Addresses. The email addresses displayed in the Email column of the Contact table are hyperlinked. Email addresses appearing in the Email column of the table are hyperlinked. Clicking any email link will open a new email message window, and the address clicked will appear in the To: field of the new message. This requires email software to be pre-installed on the user's computer and does not work with web mail, like Yahoo! Mail.

Managing members' contact information using the Contacts Dashboard replaces ASPSF's requirement to submit Board of Directors Information Update forms.

Sorting. All columns of the Contact table may be sorted in ascending or descending order. Only one column may be sorted at a time. Click anywhere in the column header to sort that column. Either an up arrow or down arrow (▲ or ▼) will appear in a column header that has been sorted.

Searching. Searchable content includes affiliate names, as well as any links displayed in the table. Column headers and other table labels are excluded. Results are dynamically generated as the user types characters in the search field. The search function does not allow the use of operators like +, -, |, AND, NOT, or OR.

Read about the Reports dashboard to learn how to create mailing labels or to create merged lists of information.

New student contact records are added automatically to the Contacts dashboard as online scholarship applications are submitted. It is usually unnecessary for Affiliates to create new student contact records.

CREATE A NEW CONTACT RECORD

Affiliates may create new contact records either for members or students.

1. Above the top-left margin of the Contact table, click the appropriate list (either Contacts or Students) to which the new contact should be added. NOTE: It is typically not necessary to add new student contact records, as they will be automatically created as student apply for the scholarship.
2. Click the **Create New** link, also located above the top-right margin of the Contact table.

Read on pages 39-40 about assigning roles and creating users.

VIEWING SCHOLARSHIP APPLICATIONS

Users may view details about specific scholarship applications submitted by a student. From the Student Contacts dashboard, navigate to the applicant's contact record, then click the **Edit** link next to the record. In the Scholarship Applications section of the Contact Detail screen, click the **View** link next to a scholarship application record. Read more about the Contact Detail Screen on pages 39-41.

DISBURSING A SCHOLARSHIP AWARD

While the System is not designed to serve as an accounting or bookkeeping tool, it is able to track both award and disbursement activity. Within the context of the System, a scholarship that has been "awarded" only means that an application has been approved. The System uses the Award amount recorded in each Scholarship Cycle to aggregate the value of awards.

Some Affiliates use a vendor or reimbursement system to disburse their scholarships. From time to time, awards must be rescinded in cases where students become ineligible to receive a full scholarship. While in

other cases, it does not make sense for Affiliates to set an award amount, when they pro-rate or use other formulas to calculate the individual award amounts. Therefore the value of Awards as a measurement of actual scholarship outputs is often deceiving.

To accurately capture actual scholarship outputs, Managed Affiliates must enter disbursement transactions for each scholarship recipient:

1. From the Student Contact dashboard, search for the awardee's name and click the **Edit** link next to the contact record.
2. In the Fund Disbursements section. Click the **New Disbursement** link to create a new disbursement transaction.
3. Record the disbursement details, then click the **Create** button.
   Type is the type of scholarship award to be disbursed. Most awards are considered 'regular' scholarships because they are a customary or base award amount. Read in the Glossary about stipends and bonus awards.
   Amount is the actual dollar amount for which a scholarship check will be issued. This may only be a portion of the scholarship award if the affiliate uses a reimbursement system or pays the scholarship in increments throughout the semester.

> Managed Affiliates that use the Scholarship Disbursement tool to manage award disbursements are not required submit Scholarship Award Reports each semester. The disbursement record should be reconciled periodically by the Affiliate Treasurer.

This records the disbursement transaction on the awardee's Contact Detail screen in the Fund Disbursements table. The record of total disbursements maintained in the Scholarship Management System should match the Affiliate's income and expense statement and should be reconciled periodically by the SPSF Treasurer. The disbursement amount is used by ASPSF to report to funders on the total value of scholarships awarded throughout the ASPSF network. Read more about the Contact Detail Screen below.

CONTACT DETAIL OR PROFILE SCREEN

Click the **Edit** link next to any record in the Contact table to open and view details about individual's profile. Users may revise certain information stored in the profile and save changes by clicking the **Save** button located at the top or bottom of the screen. To close the contact record and/or to exit without saving changes, click the **Back** button.

Scholarship Applications and Fund Disbursements Sections. Some current Affiliate members may be former Single Parent Scholarship applicants and/or recipients. If so, a list of their scholarship applications and disbursement activity will be listed in these sections.

ASSIGNING ROLES AND CREATING USERS

Once an individual has a contact record established in the System, Affiliates may assign roles and login credentials to the individual.

Assigning a Role to an individual does not automatically create logon credentials. Logon credentials must be established separately through the Contact Detail screen.

Roles that may be assigned to users by an Affiliate Admin are Affiliate Admin, Affiliate User, and Student.

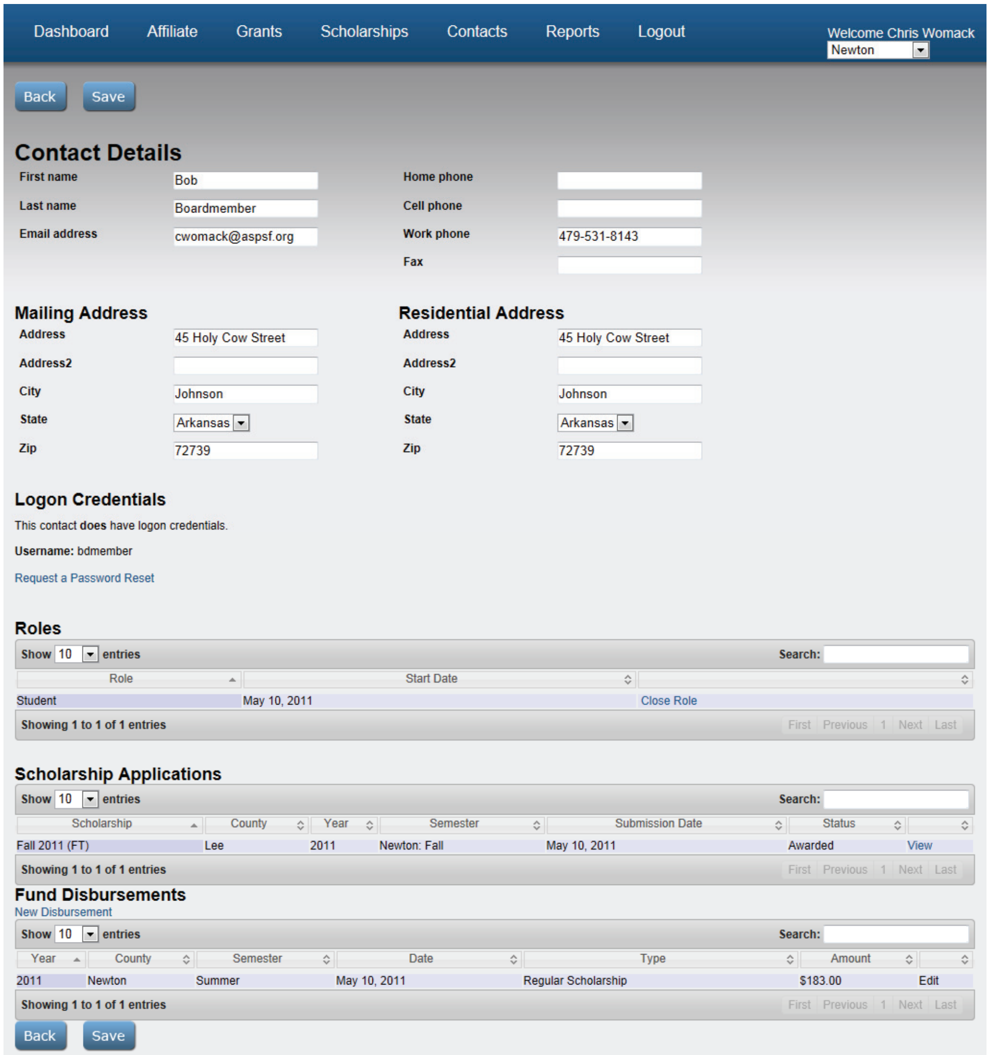

Figure 27 – Affiliate users Contact Detail screen

A NOTE ABOUT STUDENT ACCOUNTS: Student accounts are not “owned” by any specific Affiliate. Instead they are temporarily assigned to an Affiliate when a student applies for one of the Affiliate’s scholarships. If the student applies to another Affiliate, the student account will be reassigned to the new Affiliate.

Upon re-assignment of a student, former Affiliates retain access to the student’s history, up to the date the re-assignment occurred. Former Affiliates always have limited access to the student’s future data, except the student’s new scholarship award and disbursement records. This assists the former Affiliate with student follow-up. The new Affiliate has access to the student’s prior scholarship activity, such as dates of application and award, but they do not have access to the prior award and disbursement records.

CHANGE PASSWORD REQUEST

- Only the Database Administrator and Affiliate Administrators have the privilege to reset user passwords and deactivate user accounts.
- Affiliate Administrators who aren't able to login to the System must request a password reset from the Database Administrator. Read about Technical Support on page 4.
- Affiliate users must request user accounts and password resets from the local Affiliate Administrator.
- While students are able to create their own user accounts and change their own passwords, they can also request a password resets from the Affiliate Administrator.

To reset a password, the Database Administrator or Affiliate Administrator should first verify with the user that the email stored in his/her user profile (Contact record) is correct. This email address is used by the password reset function to send a unique reset link to the user via email. This link is only valid for 24 hours, at which time it will expire. If the user does not click the link within that period of time, s/he will need to request another password reset.

The Change Password Request command requires the Contact to have a valid email address stored in the System. The email link the Contact receives expires after 24 hours.

To change a user's password:

1. Search for the user's contact record on the Contact Dashboard. Switch between the Contact list or Student list to search each list.
2. Click the **Edit** link next to the user's record in the Contact table to open his/her profile.
3. In the Logon Credentials section, click the **Request a Password Reset** link. The reset link in the email will direct the user to a password reset window, in which s/he can enter a new password.

DISABLING A USER'S LOGON CREDENTIALS

To disable a user's ability to login to the Scholarship Management System:

1. Search for the user's contact record on the Contact Dashboard. Switch between the Contact list or Student list to search each list.
2. Click the **Edit** link next to the user's record in the Contact table to open his/her profile.
3. In the Roles section of the Contact Detail window, click the **Close Role** link next to the appropriate user role.

CAUTION: Some users may have more than one Role listed. Only close those Roles that are necessary to prevent the user from accessing unnecessary information. For instance if a user is a former board member and a former student, only close the Affiliate User role, but do not close the Student role. This will prevent the former board member from accessing sensitive Affiliate records, but will still allow the person to log into his/her Student account and review personal scholarship history.

REPORTS

The Reports Dashboard offers users a way to generate custom lists of information and aggregate reports. The types of information and the level of detail accessible to the user is determined by the privileges and roles assigned to the user account.

These generated reports may be viewed on the screen, copied and pasted into external documents, printed, saved as a PDF document, or exported into a spreadsheet for further manipulation.

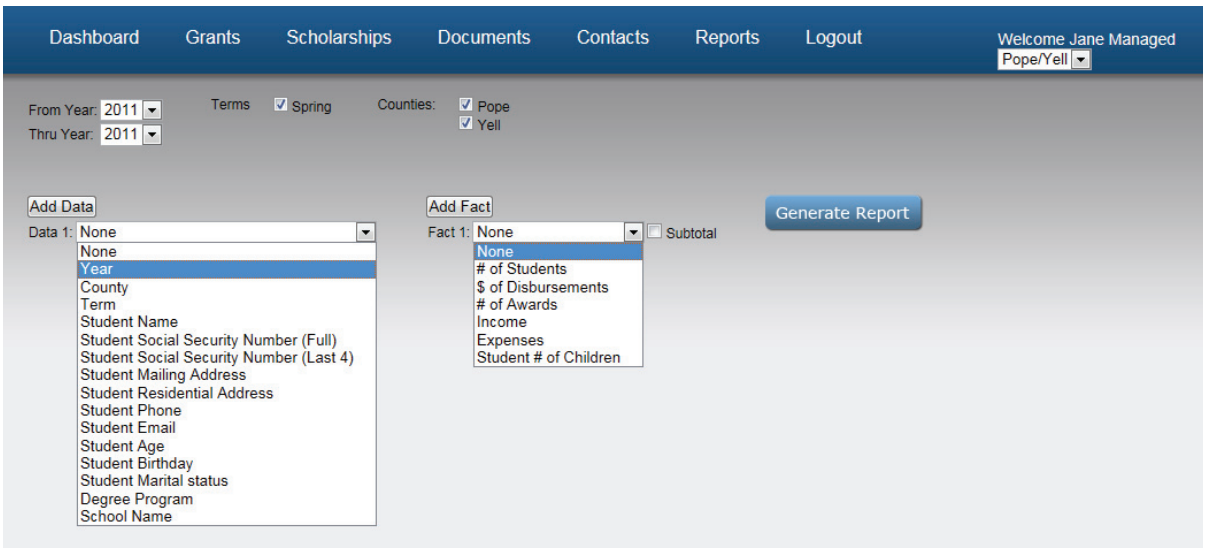

Figure 28 – Affiliate users Reports Dashboard

From Year / Thru Year. The year dates range from the year in which the first records were recorded in the System through to the present date.

Terms. Terms refers to semesters. The available list of Terms is relevant to the service area selected in the Role Selector field. Spring, Summer, and Fall is relevant to the entire ASPSF network, while a specific affiliate may only list Spring and Fall terms.

Counties. The available list of Counties depends on which service area is selected from the Role Selector Box.

Data. An optional field used to define the order by which report data will be organized (e.g. by year, by county, by semester, etc.) To add a Data criterion to the report, select it from the drop-down. To add additional Data, click the **Add Data** button and select a criterion from the new drop-down field. To remove a Data criterion, click the **X** link adjacent to the item.

Facts. An optional field used to select the types of data to query and display in the report. To add a Fact criterion to the report, select it from the drop-down. To add additional Facts, click the **Add Fact** button and select a criterion from the new drop-down field. To remove a Fact criterion, click the **X** link adjacent to the item. One or more Facts may be subtotaled by clicking the checkbox next to each Fact.

Exporting or Printing Reports. Once a report has been generated and results are visible in the report display area at the bottom of the window, the report may be printed or exported by clicking one of the icons above the top-right margin of the display area.

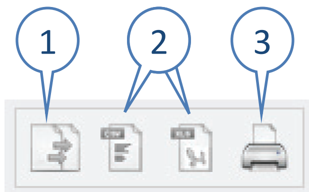

Figure 29 – Copy, Export, and Print icons

1 – Copy/Paste Command. The Copy command allows the user to copy and paste the contents of the table into an external document, like an email, a Microsoft Word document, etc.

2 - Exporting Commands. Two types of Export commands are available – export as a CSV and export as a Microsoft Excel file. Either format enables the data to be imported into a spreadsheet application, like Microsoft Excel. CSV files in particular may be imported into word processing, spreadsheets, or database applications. Either of these formats allows the user to further analyze and manipulate the data in a tabular format. Read more about manipulating report data and creating mailing labels below.

3 - Printing Command. The Print command sends the contents of the table to a printer if one is accessible from the user's computer. The Print command can also be used to convert the report into a PDF document. For this to work, Adobe Acrobat Professional or other 3rd party PDF conversion software must be installed on the user's computer.

Manipulating report data in a spreadsheet.

4. Create a desired report and export it into a new spreadsheet.
5. Create any necessary formulas to aggregate or analyze the data in the spreadsheet.
6. Use the spreadsheet application's built-in graphing tools to create attractive bar graphs or charts using the data in the spreadsheet. Or dress up the format of the tabular layout and copy and paste into reports to funders or promotional materials.

Mail merge and creating mailing labels.

7. Create a report listing the names and contact information of individuals.
8. Export this list into a spreadsheet, such as Microsoft Excel.
9. Review and edit the list as necessary.
10. Save the spreadsheet to your computer's Desktop or other location that can be found easily later. Close the spreadsheet application.
11. Open Microsoft Word or other 3rd party word processing application that has a built-in mail merge command. Create a new letter, mailer or mailing label. At the appropriate step in the merge process, browse and select the new spreadsheet containing the mailing list as the source file for the merge.
12. Complete the merge and print.

Querying and aggregating responses to custom questions included on scholarship applications. An applicant who attends the University of Arkansas may record the school name on her scholarship application as U of A

or UALR or University of Arkansas. The System will recognize these as three different schools instead of the same school. For this reason, the Reports Dashboard of the Scholarship Management System is not able to aggregate free-form text responses collected on scholarship applications.

It is possible to work around this issue by aggregating responses using a spreadsheet application like Microsoft Excel:

4. Create a report listing the responses to desired questions and any other necessary data. Export the list into a spreadsheet application like Microsoft Excel.
5. Use the spreadsheet application's Search and Replace functions to normalize the data. That is, search for and replace all variations of the same response (e.g. U of A Little Rock, UALR, U of A LR) with a consistent value (e.g. UALR).
6. Apply any desired formulas (e.g. use Excel's COUNT() function to tally the number of students who attend UALR)

FORMS

Beginning January 1, 2013, ASPSF will no longer accept the Scholarship Award Report, Annual Follow-up Report, or the Board of Directors Information Update form via email, fax, or mail. The Forms Dashboard has been designed to facilitate the submission of these required reports, with the exception of the Board of Directors Information Update form. This information will be managed through the Contact Dashboard (see pages 37-41).

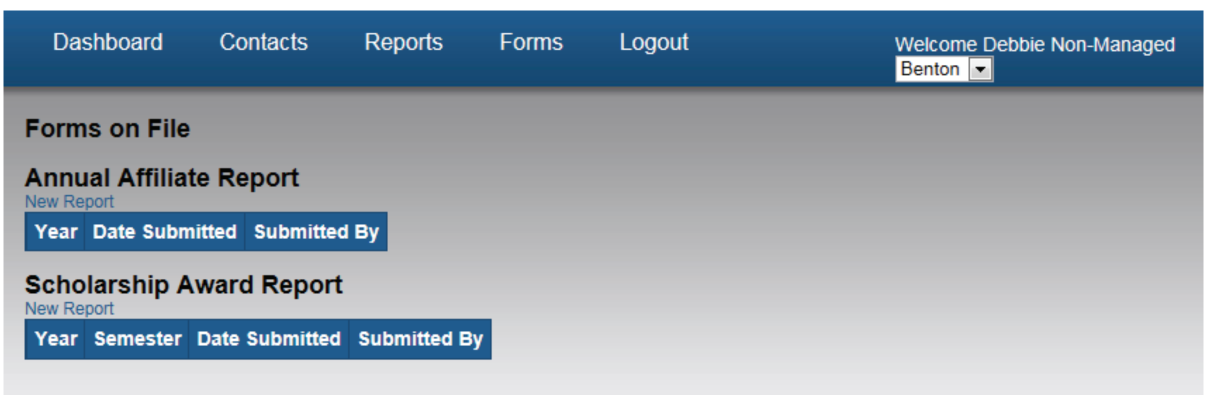

Figure 30 – Non-managed Affiliates users Forms dashboard

ANNUAL AFFILIATE REPORT

All SPSF Affiliates are required to conduct a follow-up study of their scholarship applicants.

- Non-Managed Affiliates are required to submit an Annual Follow-up Report using the Forms Dashboard.
- Managed Affiliates can assist their online scholarship applicants to self-report the follow-up information through the applicant's My Profile screen. However, Managed Affiliates are responsible

for monitoring the reporting status of their students and for reporting any missing information themselves.

Instructions for Non-Managed Affiliates: Click the **New Report** link above the top-left margin of the Annual Affiliate Reports table. This form is designed much like the traditional, paper-based form. Complete all fields of the form, and then click the **Submit Report** button. A record of the report will appear in the Annual Affiliate Reports table on the Forms Dashboard.

SCHOLARSHIP AWARD REPORT

All SPSF Affiliates are required to provide aggregate information to ASPSF regarding their scholarship awards.

- Non-Managed Affiliates are required to submit a Scholarship Award Report ***each semester*** using the Forms Dashboard.
- Since Managed Affiliates manage their student and scholarship records using the Scholarship Management System, ASPSF has access to aggregate award information on demand. Therefore, it is no longer necessary for these Affiliates to submit Scholarship Award Reports.

Instructions for Non-Managed Affiliates: This form is designed to capture aggregate statistics for one or more scholarship TYPES awarded by an affiliate for a specific county, semester, and year. Read below descriptions about each field.

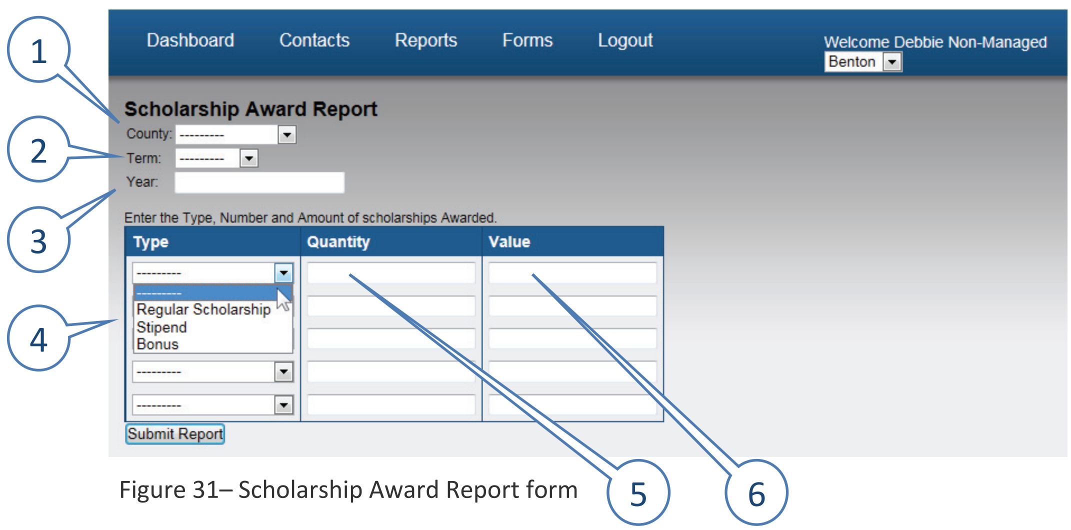

Figure 31– Scholarship Award Report form

1 – County Selector. Select the county for which the scholarship award data is reported. Affiliates with more than one county in their service area should submit separate Scholarship Award Report for each county.

2 – Term Selector. Select the semester for which the scholarship award data will be reported. A separate Scholarship Award Report must be submitted for each term.

3 – Year. Enter the year date in YYYY format.

4 – Type Selector. Select the type of award for which the scholarship award data is to be reported. Options include Regular Scholarships, Stipends, and Bonuses. More than one type may be reported on a single Scholarship Award Report by completing additional rows in the form.

5 – Quantity. Enter the total number of scholarship awards for each award Type selected.

6 – Value. Enter the total actual dollars **disbursed** for each selected award Type.

Once all necessary fields have been filled in, click the **Submit Report** button. A record of the report will appear in the Scholarship Award Report table on the Forms Dashboard.

STUDENT ROLES

This section pertains to the roles of an individual who is a prospective or existing applicant of the Single Parent Scholarship. Affiliate members or ASPSF Staff may adopt a Student role to monitor the self-reporting of scholarship recipients, provide technical support to student users, etc.

Student accounts never expire; however, they can be disabled by an Affiliate Administrator. Student users can login to their account with a valid username and password, and will always have access to view their scholarship and disbursement history, and self-report annual follow-up information.

Students may access the Scholarship Management System in one of two ways:

- Clicking a valid scholarship application link posted on the ASPSF website or other website
- Browsing to http://manage.aspsf.org/students/login/

When logged in, the user's name as it appears in the user's profile record is displayed in the upper-right area of the screen ("Welcome Jane Doe").

REGISTERING FOR A NEW STUDENT ACCOUNT

Prospective applicants may apply online for the Single Parent Scholarship using the Scholarship Management System, provided their local Affiliate manages its scholarships through the System. Student User accounts are managed more dynamically because they can be created by anyone, and they can be reassigned to different Affiliates based on the student's application submissions.

At the login screen, new students can register for an account by clicking the **Register Here** link located below the password field. Once all fields have been filled in, click the **Register** button.

Duplicate Student Profiles. If an existing Student User attempts to register for a new account, the System attempts to match the registration information against all existing student profiles. Depending on the information provided, the user account will be accepted or rejected.

- A new account is created if the social security number provided in the new registration does not match any existing user profile.
- A new account is created if the social security number provided in the new registration matches an existing user profile; however the Database Administrator will be notified of a potentially duplicate profile and can merge the two profiles if necessary.
- A new account is denied if any combination of two or more of the following matches any existing user account: birth date, social security number, or gender.
- New accounts may not be registered with the same username as any existing user account. Registrants will be repeatedly prompted to choose a unique username until one has been accepted.

Students who are not able to login because they forgot their username or password should first contact the Affiliate Administrator of the last SPSF to which they applied to request a password reset. If the username is unknown, the student or Affiliate Administrator should contact the Database Administrator for further assistance.

HOME

The Scholarship Management System has two "welcome" screens. One is the Home page, which is the initial screen students see upon logging in. The other is the first page of the online scholarship application, if Welcome text was created by the Affiliate when establishing the scholarship opportunity.

The Home page provides generic information to the student, and is standard to all SPSF Affiliates. The information displayed on this page may not be customized.

MY APPLICATIONS

Students who have previously applied online for a Single Parent Scholarship will see their complete online application history from the My Applications screen. This screen displays each of the student's scholarship applications, the terms of the scholarship for which they applied, and the status of the application.

Those applications still in Draft status may be opened and edited, as long as the deadline of the scholarship has not expired. Applications that have any other status may be opened for review, but they may not be edited.

SPSF Affiliates are not able to access applications that are still in Draft status.

MY PROFILE

This screen enables students to manage their basic contact information, demographic information, and self-report follow-up information. Much of the information displayed on this screen is derived from the "General" section of the student's online scholarship application.

MY DISBURSEMENTS

This screen allows students to review their scholarship disbursement history. This information is recorded by the awarding SPSF.

CHANGE PASSWORD

This command enables the user to change his or her password. Students who need to change their username should contact the Database Administrator.

SCHOLARSHIP APPLICATION FORM

This section only applies to scholarship applications created through the Scholarship Management System. Managed Affiliates configure the application settings, along with any custom questions they wish to add to the application questionnaire.

The online scholarship application is designed to allow students to complete the various sections and questions in any order they choose. Prior to closing an incomplete application, students must click the **Next** or **Save** button to save their progress.

Applications that have not been completed or submitted appear with a "Draft" status on the My Applications screen. ***As long as the scholarship deadline has not expired***, applications with Draft status can be re-opened at a later time for the student to finish and submit. Incomplete applications cannot be submitted.

Student Profile. This is a default section and appears on all scholarship applications created in the Scholarship Management System. The applicant records their basic personal information in this section (name, contact information, and demographic information). The options available in the county selector field are only those that correspond to the Affiliate's service area.

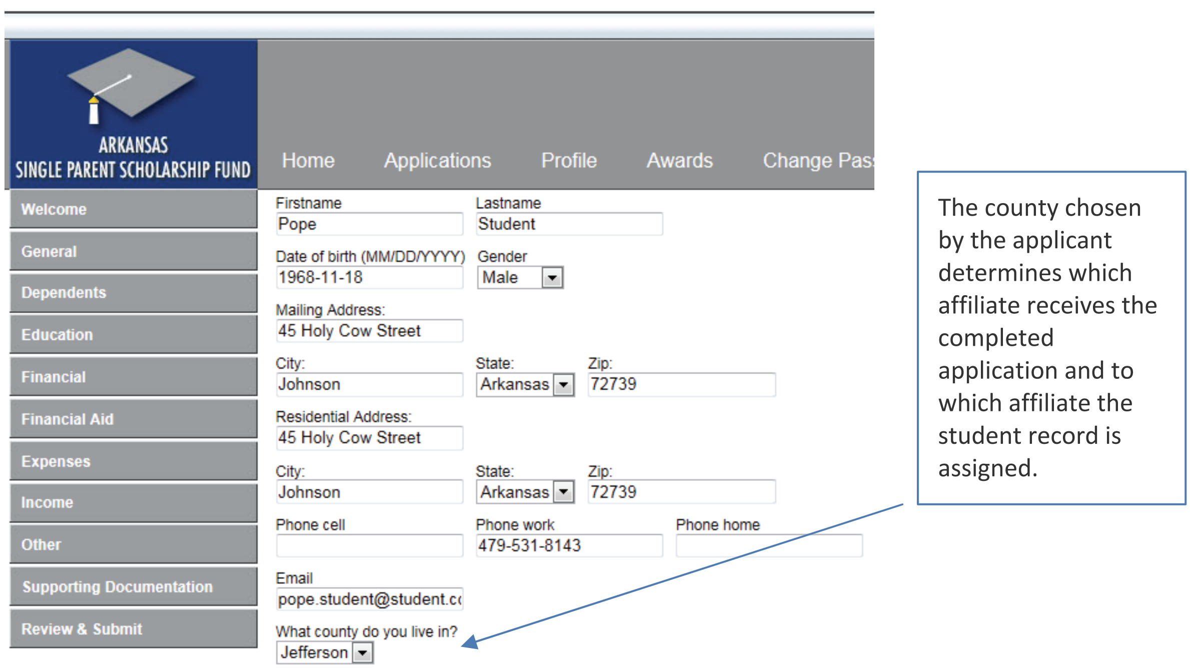

Figure 32 – Example Scholarship Application record

Dependents Section. Applicants use this section to record information about any individuals who depend on the applicant for financial support (children or adults, relatives or not).

Education Section. Applicants use this section to record information about their education history and current enrollment.

Employment Section. Applicants use this section to record information about their current and past employment, their health insurance coverage, and community service or volunteer activities.

Financial Aid Section. Applicants use this section to record information about any financial aid they receive toward their education, as well as their SPSF history. The latter is useful in case the applicant was previously served by a Non-managed Affiliate.

Expenses Section. Applicants use this section to record information about their household expenses. Three values must be recorded for each expense item: last semester, this semester, and next semester

Income Section. Applicants use this section to record information about their household income. Three values must be recorded for each income item: last semester, this semester, and next semester

Supporting Documentation Section. Applicants use this section to upload electronic files that contain information to support the scholarship application. This section may be option, according to the internal policies of each Affiliate.

Review & Submit Section. Applicants must certify that they have read and understand a default, non-customizable Memorandum of Understanding & Disclosures statement. They may optionally choose to grant permission to the Affiliate to publish their name and bio information.

Once all sections and required fields are complete, the applicant can click the **Submit** button in this section to submit the application. Once this step is performed, the application will be locked from editing. The student may return to the My Applications screen to view the contents of the application.